Cooperative Baptist Fellowship Foundation

FREEWILL

NEW YEAR'S RESOLUTION TOOLKIT FOR BEQUESTS

Prepared for Churches

PRESENTED BY

FreeWill + Cooperative Baptist Fellowship Foundation

FreeWill + Cooperative Baptist Fellowship

Legacy Giving Toolkit

A timeless resource for CBF churches to invite their congregations into faithful generosity

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This toolkit includes an email, social media posts, an announcement script, a bulletin/newsletter insert, and FAQs to help your congregation plan a lasting legacy through their will. Customize the bracketed fields for your church. This content is designed to be evergreen — no dates or seasonal references are included.

We recommend: including a header image, a personal photo in your email signature, and using the tracking links provided so CBF can accurately steward your outreach.

Email

Bequest Tracking Link (hyperlink as shown below):
https://partner.freewill.com/cbf?utm_source=partner&utm_medium=eblast&utm_campaign=202604_cbf_bespoke_direct_toolkit_bespoke_general

Gift Intent Form Tracking Link (hyperlink as shown below):
https://partner.freewill.com/record/cbf?utm_source=partner&utm_medium=eblast&utm_campaign=202604_cbf_bespoke_direct_toolkit_bespoke_general

Subject line: Pass on your faith — and everything that goes with it

Preview text: A free, simple tool to help you care for the people you love and leave a legacy of faith.

Email Body

Dear [NAME],

As followers of Jesus, we believe that how we care for one another — and how we steward what we've been given — is part of what it means to live faithfully together. Creating a will is one of the most concrete ways to do both.

A will lets you make clear decisions about the people you love, name the causes you believe in, and pass on your values and your valuables to the next generation. It's a quiet, powerful act of faithfulness — and it's something we want to make easier for everyone in our congregation.

In partnership with the Cooperative Baptist Fellowship (CBF) and FreeWill, [CHURCH] is offering every member of our community free access to a simple, guided estate planning tool. In about 20 minutes, you can create or update a legally valid will and:

- Care for your family and the people closest to you
- Make thoughtful decisions about what happens to what God has entrusted to you
- Support the ministries and communities — including [CHURCH] — that have shaped your faith

This is one more way we try to walk alongside you in every part of life. It costs nothing. There's no pressure. It's simply a resource we're glad to offer.

You can pass on your values and your valuables. Get started here — it's free and takes about 20 minutes.

With gratitude,

[SIGNATURE]

P.S. If you've already included [CHURCH] or CBF in your estate plans, we'd love to know — fill out this short form and we'll welcome you into the Fellowship Heritage Society.

Social Media Posts

Tracking Link for Social: https://bit.ly/3NjXgzn

Post Option 1

What does it look like to care well for the people you love — and for the ministries you're part of?

Creating a will is one of the most meaningful ways to answer that question. In partnership with the Cooperative Baptist Fellowship, [CHURCH] offers every member of our community free access to FreeWill — a simple tool that takes about 20 minutes and costs nothing. You can pass on your values and your valuables. Get started: [LINK]

Post Option 2

Good news, justice, and hope — that's what we're working toward together. Your estate plan is one way to keep that work going.

Through our partnership with the Cooperative Baptist Fellowship and FreeWill, every member of [CHURCH] has free access to a simple, guided tool to create a legally valid will. Care for your family. Support the ministries you love. Leave a legacy that lasts. [LINK]

Post Option 3

Creating a will is a caring act — for your family, your community, and the work of good news, justice, and hope you've been part of here at [CHURCH].

In partnership with the Cooperative Baptist Fellowship and FreeWill, we're offering every member of our congregation free access to a simple, online estate planning tool. It takes about 20 minutes and creates a legally valid will at no cost to you. [LINK]

Announcement Script

I want to take just a moment to share something with you — something we hope will be genuinely useful.

We don't talk about wills and estate planning very often in church. But creating a will is actually one of the most loving, faithful things any of us can do. It's how we care for the people closest to us, make our own decisions about the future, and pass on the values — and the valuables — that matter most.

In partnership with the Cooperative Baptist Fellowship, [CHURCH] is offering every member of our congregation free access to FreeWill — a simple, online tool that walks you through the process in about 20 minutes. It costs nothing. It's our way of walking alongside you in this part of life, too.

You can pass on your values and your valuables. We hope you'll take a look.

Get started at FreeWill.com/CBF.

Bulletin / Newsletter Insert

Bequest Tracking Link (hyperlink as shown below):
https://partner.freewill.com/cbf?utm_source=partner&utm_medium=enewsletter&utm_campaign=202604_cbf_bespoke_direct_toolkit_bespoke_general

Gift Intent Form Tracking Link (hyperlink as shown below):
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Pass On Your Values and Your Valuables

As people of faith, we want to walk alongside one another in every part of life — including the decisions we make about the future. Creating a will is one of the most caring things any of us can do. It allows you to look after the people you love, be thoughtful about what you've been entrusted with, and support the ministries and communities that matter to you.

In partnership with the Cooperative Baptist Fellowship (CBF), [CHURCH] is offering every member of our congregation free access to FreeWill — a simple, guided estate planning tool. In about 20 minutes, you can create or update a legally valid will and:

- Care for your family and the people closest to you
- Make thoughtful decisions about what God has entrusted to you
- Support the church and ministries that have shaped your faith

It's free, it's simple, and it's one more way we hope to be useful to you and the people you love.

For digital inserts: Learn more and create my plan

For print inserts: Get started today at FreeWill.com/CBF.

Have you already included [CHURCH] in your estate plans? We would be honored to know. Fill out a short form at FreeWill.com/Record/CBF so we can welcome you into the Fellowship Heritage Society.

Frequently Asked Questions

Why is our church offering this resource?

Part of what it means to be a congregation is walking with one another through all of life. Offering a free estate planning tool is one practical way we try to do that. We want our members to have what they need to care well for the people they love — and to make plans that reflect their faith and values.

What is a legacy gift?

A legacy gift is a gift you choose to include in your will or estate plan — a way of directing part of what you've been entrusted with toward the people and ministries you love. It doesn't require any commitment today. It's simply a way of making your values visible in the plans you leave behind.

How does FreeWill work?

FreeWill is a free, online estate planning tool offered through a partnership between [CHURCH] and the Cooperative Baptist Fellowship. It walks you through creating or updating a legally valid will at your own pace — most people complete the process in about 20 minutes. You can get started anytime at FreeWill.com/CBF.

Does it cost anything?

Nothing at all — no subscription, no fee, no financial commitment of any kind. This resource is made possible through the Cooperative Baptist Fellowship's partnership with FreeWill and is offered freely to every member of our congregation.

Can I include my local church in my estate plan?

Yes — and you can include anyone or anything that matters to you. As you work through FreeWill, you'll have the opportunity to name [CHURCH], CBF, or any other ministry or cause you'd like to support. Your legacy is yours to shape.

Do I need to tell the church what I've decided?

Not at all — this is entirely your decision. If you'd like to let us know you've included [CHURCH] or CBF in your plans, you're welcome to fill out this short form and we'd love to welcome you into the Fellowship Heritage Society. But there's no expectation. We offer this resource because we care about you and want to walk with you well.