



QCD Tool v2: New Features

July 2020 Updates to the QCD Tool

FreeWill has made some exciting new updates to the QCD tool, informed by valuable feedback from partners and donors alike. Here's everything you need to know about the tool's new features, the issues they are aimed to resolve, and how they will benefit you and your supporters:

"Request tax acknowledgement letter" button

- **Goal:** This feature is designed to help your organization track QCDs made outside of FreeWill, and to help you connect your incoming QCD checks to specific donors.
- **How it works:** This button allows all of your past QCD donors to request a tax acknowledgment letter through your custom QCD page, whether or not they used the FreeWill tool to make their QCD. Your organization will then get a notification in your partner portal with the donor's information so you can guide them through your usual tax acknowledgement process.

"Complete manually or by phone" button

- **Goal:** This feature is designed to help your organization identify and track donors who would rather make a manual QCD.
- **How it works:** This button allows donors to type in details about their planned QCD, and then download and print the forms to complete offline.

"Learn more about QCDs" button

- **Goal:** This feature is designed to make your QCD landing page double as a donor education resource for prospective donors who want to learn more about QCDs before they make a donation.
- **How it works:** This button allows prospective QCD donors to get in-depth context on what QCDs and RMDs are, who is eligible, and why they are a mutually beneficial way to give. It also includes a button to "Make your QCD gift for free", so that the tool is an easy click away.

We hope these new features help your organization to track QCDs made outside of FreeWill, identify incoming QCD checks so you can build relationships with the donors that made them, and support you in QCD donor education.

It's thanks to partner feedback that we continue to improve our QCD tool, so if you have input on these new features, don't hesitate to reach out to your strategist.