



QCD v2 Phone Script Template

The phone scripts below reflect new additions to FreeWill's QCD v2 tool, including the ability to request a tax acknowledgement letter, complete your forms offline, or learn more about QCDs and the RMD.

Since not all of these features will be relevant to every donor, we have segmented this script for donors who have indicated an interest in QCD donations, supporters who are completely new to the QCD process, and past QCD donors.

We have also included a final add-in section about the 2020 RMD removal, in case your donor asks for specific information on the RMD.

Phone script intro

Hello, my name is [NAME], calling on behalf of [ORGANIZATION]. Do you have time for a quick conversation?

First, I want to give you a huge thank you for being part of our [ORGANIZATION] community. It's been a challenging time for so many of us, and I know I've been more grateful than ever to have this important work to focus on and keep me going.

I wanted to check in and see how you were doing — how have you been these past few weeks?

[...]

Sample script: Prospective QCD donors

We recommend referring to the script below when talking with supporters who are already familiar with QCDs.

Today I want to remind you about a method of giving that will not only benefit [ORGANIZATION], but can actually help you save on taxes. As an IRA holder, I believe you're familiar with Qualified Charitable Distributions?

That's great! Glad to hear you're staying on top of giving options. For anyone who's financially able to take this step, [ORGANIZATION] is thrilled to welcome them into our donor community — QCDs are a mutually beneficial way to immediately support our work in [MISSION AREAS]. Are you interested in making a gift to [ORGANIZATION] through your IRA today?



A. If no:

Not a problem. Would you like to learn more about QCDs, so you can read up on this innovative giving method and decide if it's right for you later on? **[If so, direct them to the "Learn more about QCDs" button on the FreeWill.com/[URL] page.]**

B. If yes:

Great! We have an easy online process that I'm happy to walk you through:

You can find the donation tool at **FreeWill.com/QCD/[URL]**. When you get to the webpage, you'll see a couple of different options.

First, you'll see a button that lets you make a QCD right away. After you click that button, the site will walk you through the process, and at the end you will be asked to download your form. The whole thing takes about 10 minutes. All you have to do is follow the printed instructions, and send in your form.

Even though the website will auto-fill the forms for you, I know that some donors prefer to fill out the paperwork themselves. If you'd like to print and fill in your forms, all you have to do is click the button that says "Complete manually or by phone". I'm happy to stay on the line to discuss the process with you.

[...]

Thank you so much! Do you have any more questions?

Excellent. I enjoyed speaking with you **[NAME]**, and if you have any more questions, please feel free to reach out.

Sample script: QCD beginners

*We recommend referring to the script below when talking with donors who are over 70.5 years of age, but **are not familiar with QCDs.***

Today I want to tell you about a method of giving that will not only benefit **[ORGANIZATION]**, but can actually help you save on taxes. But first, a few quick questions. Do you have a traditional IRA account?

Are you 70 ½ or older?

Excellent. Have you heard about Qualified Charitable Distributions?



A. If no:

No worries, I'm happy to explain! A Qualified Charitable Distribution, or a QCD, is a tax-free gift that you are eligible to make directly from your IRA to an organization of your choosing, like [ORGANIZATION]. Many donors choose to give this way because these gifts have the same immediate impact as a direct donation, but they're always tax-free, regardless of whether or not you itemize deductions on your tax-return.

B. If yes:

That's great! Glad to hear you're staying on top of giving options.

For anyone who's financially able to take this step, [ORGANIZATION] is thrilled to welcome them into our donor community. Are you interested in making a gift to [ORGANIZATION] through your IRA today?

A. If no:

Not a problem. Would you like to learn more about QCDs, so you can read up on this innovative giving method and decide if it's right for you later on?

- **If yes:**

Wonderful. Our QCD giving webpage actually provides all the background information you may be looking for on QCDs. If you go to **FreeWill.com/QCD/[URL]**, you'll see a button at the bottom that says "Learn more about QCDs". This will take you to a summary of the benefits of QCD giving, and links straight to the donation tool in the event that you do decide to make a QCD.

B. If yes:

Great! We have an easy online process that I'm happy to walk you through:

You can find the donation tool at **FreeWill.com/QCD/[URL]**. When you get to the webpage, you'll see a couple of different options.

First, you'll see a button that lets you make a QCD right away. After you click that button, the site will walk you through the process, and at the end you will be asked to download your form. The whole thing takes about 10 minutes. All you have to do is follow the printed instructions, and send in your form.

Even though the website will auto-fill the forms for you, I know that some donors prefer to fill out the paperwork themselves. If you'd like to print and fill in your forms, all you have to do is click the button that says "Complete manually or by phone". I'm happy to stay on the line to discuss the process with you.



[...]

Thank you so much! Do you have any more questions?

Excellent. I enjoyed speaking with you [NAME], and if you have any more questions, please feel free to reach out.

Sample script: Past QCD donors

*We recommend referring to the script below when talking with donors **who have already made a QCD** to your organization.*

I'm reaching out to you today because you have generously made a Qualified Charitable Distribution from your IRA to [ORGANIZATION] in the past, and I wanted to make sure you're aware that we have an online process for QCD giving that completely streamlines the QCD giving process, in case you'd like to renew your gift in the future.

First, just to cover our bases, I want to make sure you're receiving the tax benefits of your previous gift — did you receive a tax acknowledgment letter for your QCD?

A. If no:

- Luckily, I can get that set up for you right away. If you go to the website **FreeWill.com/QCD/[URL]**, you'll see a button that says "Request tax acknowledgment letter". You'll then be able to enter all the information we need to ensure that the tax letter gets to you as soon as possible. Let me know if you have any questions, but you should be all set!

While I have you, are you interested in renewing your IRA gift with our innovative, online tool? You'll be glad to know that it simplifies the process you may have experienced before: it only takes 10 minutes to use, and fills out the paperwork for you, no sensitive personal information required.

Great! We have an easy online process that I'm happy to walk you through:

You can find the donation tool at **FreeWill.com/QCD/[URL]**. When you get to the webpage, you'll see a couple of different options.

First, you'll see a button that lets you make a QCD right away. After you click that button, the site will walk you through the process, and at the end you will be asked to download your form.



The whole thing takes about 10 minutes. All you have to do is follow the printed instructions, and send in your form.

Even though the website will auto-fill the forms for you, I know that some donors prefer to fill out the paperwork themselves. If you'd like to print and fill in your forms, all you have to do is click the button that says "Complete manually or by phone". I'm happy to stay on the line to discuss the process with you.

[...]

Thank you so much! Do you have any more questions?

Excellent. I enjoyed speaking with you [NAME], and if you have any more questions, please feel free to reach out.

Optional script add-in: RMDs in 2020

If your donor asks about changes to the RMD in 2020, refer to the script below:

Certainly, I can give you some more information. We want our donors to be up to speed on how new legislation affects your giving.

Essentially, until this year, anyone with a traditional IRA was required to remove a minimum amount of funds from their IRA each year, and many generous donors chose to meet that requirement by making a qualified charitable distribution — in other words, by funneling that money straight into an organization of their choosing. But in light of the pandemic, Congress voted to waive that required minimum distribution.

However, even if the RMD is lifted, giving through your IRA is still an incredibly impactful, valuable way to support [MISSION] — especially during this challenging moment. And from a tax-saving perspective, it's still one of the smartest ways to give.