

GD Triggered Email #1: (Email to complete will/leave gift)

(Welcome Email)

Messaging: Visited the page and signed up, but didn't complete will

Subject Line: Welcome to Giving Docs! Just a few steps left . . .

Hi {contact_name},

You're signed up and ready to go! Thanks for joining our community. You're just a few simple steps away from creating your legacy.

In challenging times, it's more important than ever to come together in support of the causes and values that we care about the most. Giving Docs is the easiest way to leave a lasting gift for {org_name}. You can show your support for {org_mission1} by completing the next step!

[CTA Button]

Create Your Legacy in 3 Easy Steps

- Create your will, codicil, and/or beneficiary designation
- Support your favorite cause(s) in your legacy
- Sign your documents

We always keep your documents and personal information safe and secure.

Questions? Check out our FAQ page at www.aclu.org/givingdocs#faq or email us at {campaign_email}.

We're with you every step of the way.

Org Name: *The ACLU*

Org Mission: *the ACLU's mission to ensure that the individual rights and civil liberties guaranteed by the Constitution are protected for all people*

CTA Button: *Create Your Will*

GD Reminder Email 1a: (Email to complete will/leave gift reminder)

Messaging: Visited the page signed up, completed will but no gift

Subject Line: {org_name} needs your support! Leave your gift today.

Hi {contact_name},

We know that you care about {org_issue1}—in these uncertain times and beyond. And you took an important first step by signing up for Giving Docs, the easiest way to honor the causes you love.

Now it's time to make it count. Click below to leave your gift for {org_name} and create your legacy.

[CTA Button]

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We're with you every step of the way.

Org Name: *The ACLU*

Org Issue: *the ACLU's civil liberties work*

CTA Button: *Leave A Legacy Gift*

GD Triggered Email #2: Make it official

Criteria: Created will, asset, codicil - time to notarize...

Make it official (Recipient has chosen to leave a gift in a specific way, but hasn't signed their documents)

Messaging: Visited the page signed up, completed will, and left gift but hasn't signed their documents

Subject Line: Your gift to {org_name} is almost complete! Just one simple step left.

Hi {contact_name},

Thanks for your including {org_name} as a beneficiary of your estate plans! One more step, and it's official.

Join thousands of others who are supporting their favorite causes with planned gifts on the Giving Docs platform. Make your voice heard: click the button below to sign your official documents!

[CTA Button]

Create Your Legacy in 3 Easy Steps

- Create your will, codicil, and/or beneficiary designation
- Support your favorite cause(s) in your legacy
- Sign your documents

We always keep your documents and personal information safe and secure.

Questions? Check out our FAQ page at www.aclu.org/givingdocs#faq or email us at {campaign_email}.

We're with you every step of the way.

Org Name: *The ACLU*

Org Mission: *protect the future of individual rights and liberties for all*

CTA Button: *Sign Your Documents*

GD Reminder Email #2a: Make it official Reminder

(Recipient has chosen to leave a gift in a specific way, but hasn't signed their documents)

Messaging: Visited the page, signed up, completed will, and left gift but hasn't signed their documents

Subject Line: Make it official: one last step to complete your gift to {org_name}

Hi {contact_name},

We know that you're feeling great about your generous future gift to {org_name}. But you're not quite done yet! Make it official—sign your documents with one click.

As part of {org_name}'s community, you're {org_mission2}. Thank you!

[CTA Button]

Create Your Legacy in 3 Easy Steps

- Create your will, codicil, and/or beneficiary designation
- Support your favorite cause(s) in your legacy
- Sign your documents

We always keep your documents and personal information safe and secure.

Questions? Check out our FAQ page at www.aclu.org/givingdocs#faq or email us at {campaign_email}.

We're with you every step of the way.

Org Name: *The ACLU*

CTA Button: *Sign Your Documents*

GD Triggered Email #3: Tell client about your gift

Messaging: Visited the page, signed up, completed will, left gift, and signed their documents

Subject Line: Tell {org_name} about your gift!

Hi {contact_name},

It's official: you've named the {org_name} in your personal legacy. Can you take a moment to tell them so? They'd love to thank you for your generosity.

Click below to let them know that you're committed to supporting their work in the world!

[CTA Button]

Create Your Legacy in 3 Easy Steps

- Create your will, codicil, and/or beneficiary designation
- Support your favorite cause(s) in your legacy
- Sign your documents

We always keep your documents and personal information safe and secure.

Questions? Check out our FAQ page at www.aclu.org/givingdocs#faq or email us at {campaign_email}.

We're with you every step of the way.

Org Name: *The ACLU*

CTA Button: *Confirm Your Gift with the ACLU*

GD Reminder Email #3a: Tell client about your gift Reminder

Messaging: Visited the page signed up, completed will, left gift, signed their documents

Subject Line: Quick reminder: Tell {org_name} about your gift!

Hi {contact_name},

Thanks for making {org_name} a part of your lasting legacy—but they can't thank you if you don't tell them about it.

Take two minutes to let them know about your support for their work. Not only will you have the satisfaction of [User Mission & Payoff].

[CTA Button]

Create Your Legacy in 3 Easy Steps

- Create your will, codicil, and/or beneficiary designation
- Support your favorite cause(s) in your legacy
- Sign your documents

We always keep your documents and personal information safe and secure.

Questions? Check out our FAQ page at www.aclu.org/givingdocs#faq or email us at {campaign_email}.

We're with you every step of the way.

Org Name: *The ACLU*

Org Mission/User Payoff: *Preserving civil liberties for future generations—you'll join with many other like-minded individuals who share your passion and values for freedom and equality*

CTA Button: *Confirm Your Gift With ACLU*

GD Triggered Email #4: Invite friends to join you (Email to share):

Messaging: Visited the page signed up, completed will, left gift

Subject Line: Want one more simple way to support the things you care about—and help your loved ones do the same?

Hi {contact_name},

Congratulations: you've created a personal legacy with Giving Docs! You're making an impact for generations to come—and staying connected with the values that mean the most to you.

It's a great feeling to know that you're part of a growing community of committed donors. If you're inspired to share that feeling with others, it's simple to do so: you can make an even bigger impact in just a few minutes. {org_name}, in partnership with our team here at Giving Docs, is the proud sponsor of your free estate plan—and they're offering the same gift to your friends and family.

If you've appreciated the opportunity to live your values and leave a meaningful gift with Giving Docs, you can offer that opportunity to others by clicking the link below.

[CTA Button: Help Your Friends Make an Impact]

Create Your Legacy in 3 Easy Steps

- Create your will, codicil, and/or beneficiary designation
- Support your favorite cause(s) in your legacy
- Sign your documents

We always keep your documents and personal information safe and secure.

Questions? Check out our FAQ page at www.aclu.org/givingdocs#faq or email us at {campaign_email}.

We're with you every step of the way.

Org Name: *The ACLU*

CTA Button: *Help Your Friends Make an Impact*

GD Reminder Email #4a: Invite friends to join you reminder (Email to share)

Group: Hand Raisers

Messaging: Visited the page signed up, completed will, left gift

Subject Line: Your legacy can create even more impact!

Hi {contact_name},

You created your estate plan with Giving Docs—and you can rest assured that the people and causes you care about are a lasting part of your personal story. If you're inspired to share that experience, we've got good news: you could make an even bigger difference in just a few minutes. Our partners at {org_name} are the proud sponsors of your estate plan, and they're offering that same gift to your friends and family.

During challenging times, we all search for ways to embody our values. You know what it's like to feel connected to a community of shared beliefs; if you'd like to offer that opportunity to your loved ones, you can give them the gift of Giving Docs' platforms to help them define their own legacies. Just click below!

[CTA Button]

Create Your Legacy in 3 Easy Steps

- Create your will, codicil, and/or beneficiary designation
- Support your favorite cause(s) in your legacy
- Sign your documents

We always keep your documents and personal information safe and secure.

Questions? Check out our FAQ page at www.aclu.org/givingdocs#faq or email us at {campaign_email}.

We're with you every step of the way.

Org Name: *The ACLU*

CTA Button: *Help Your Friends Make an Impact*

GD Triggered Email #5: Deadline approaching email - Reminder

Messaging: Everyone who received an email and has not joined the challenge with the deadline approaching

Subject Line: Stay connected to what matters most. Make an impact by {end_date}!

Hi {contact_name} —

Before {end_date}, you have a unique opportunity to join with the thousands of others who have left a bequest intention with the Giving Docs platform—and made an immediate, enduring impact on the causes they care about. As the world continues to shift, connecting with our shared values is more important than ever. We're here to help.

Giving Docs has partnered with {org_name} to make the bequest process quick and easy! We're here to help people create their personal legacies in support of what matters to them by simplifying the estate planning process. We're with you every step of the way.

Together, with your support and the support of members like you, {org_name} can continue to {org_mission3}. Will you add your voice to their community?.

[CTA Button]

Create Your Legacy in 3 Easy Steps

- Create your will, codicil, and/or beneficiary designation
- Support your favorite cause(s) in your legacy
- Sign your documents

We always keep your documents and personal information safe and secure.

Questions? Check out our FAQ page at www.aclu.org/givingdocs#faq or email us at {campaign_email}.

We're with you every step of the way.

Org Name: *The ACLU*

Org Mission 3: *the ACLU vigorously defend people whose civil liberties are in immediate jeopardy and help shape the long-term future of civil liberties in America*

CTA Button: *Create Your Legacy*

GD Triggered Email #6: (Email Shared)

Messaging: Sent to anyone the user opted to share with

Subject Line: Stay connected to what matters: a special invitation from [Sharer]

Hi {contact_name} —

[Sharer] just created their personal legacy with our team here at Giving Docs. We're an online estate planning platform, helping people stay connected to community and shared values—now and in the future. [Sharer] is inviting you to create a free estate plan, helping you support the people and causes that you care about the most.

{org_name} recently partnered with Giving Docs, offering supporters like [Sharer] the opportunity to simply and easily leave charitable gifts through a will, codicil, or beneficiary designation—for free. Now, they're helping [Sharer] pay that gift forward by offering the same chance to their friends and family.

Traditionally, this process has been expensive and time-consuming—but it's simple with Giving Docs. Each step is simple and straightforward; you can walk through the process in just a few minutes, and our team is there to help you if you need it. Once you're done, you can revisit or update your documents for free at any time.

Click below to join [Sharer] and create your legacy!

[Create Your Legacy Button]

With warm regards,
{Sharer}

Org Name: *the ACLU*

Sharer: *[Signed up member who shared the campaign]*

GD Reminder Email #6a: (Email Shared Reminder)

Messaging: Sent to anyone the user opted to share with who hasn't opened or viewed the email

Subject Line: Don't miss this special invitation from {Sharer}: create your personal legacy!

Hi {contact_name} —

We messaged you a couple of days ago, but we wanted to make sure you didn't miss this opportunity.

[Sharer] recently created their personal legacy with Giving Docs. We're an online estate planning platform that helps people support the people and causes that matter to them. [Sharer] is inviting you to create a free estate plan, helping you ensure that the things you care about most are an enduring part of your story.

{org_name}, in partnership with Giving Docs, is offering supporters the opportunity to simply and easily leave charitable gifts through a will, codicil, or beneficiary designation—for free. Now, they're helping [Sharer] pay that gift forward by inviting their friends and family to create their own legacies.

Traditionally, this process has been expensive and time-consuming—but it's simple with Giving Docs. Each step is simple and straightforward; you can walk through the process in just a few minutes, and our team is there to help you if you need it. Once you're done, you can revisit or update your documents for free at any time in the future.

Click below to create your legacy!

[Create Your Legacy Button]

With warm regards,
Your friends at Giving Docs

Org Name: *the ACLU*

Sharer: *[Signed up member who shared the campaign]*

GD Reminder Email #6b: (Viewed Initial email but hasn't signed up)

Messaging: Sent to anyone the user opted to share with who opened or viewed the email but hasn't signed up

Subject Line: Join [Sharer]: create your legacy and make an impact!

Hi {contact_name} —

A few days ago, [Sharer] invited you to create a free estate plan—for free. We're following up to make sure that you don't miss this special opportunity.

Sign-up ends on [month date], so join [Sharer] and create your legacy today!

{org_name} recently partnered with Giving Docs, offering supporters like [Sharer] the opportunity to simply and easily leave charitable gifts through a will, codicil, or beneficiary designation. Now, they're helping [Sharer] pay that gift forward to their friends and family—which means that you're invited to create an estate plan that reflects your values, too!

Traditionally, the estate planning process has been expensive and time-consuming—but it's simple with Giving Docs. Each step is simple and straightforward; you can walk through the process in just a few minutes, and our team is there to help you if you need it. Once you're done, you can revisit or update your documents for free at any time in the future.

Click below to create your legacy!

[Create Your Legacy Button]

With warm regards,
Your friends at Giving Docs

Org Name: *the ACLU*

Sharer: *[Signed up member who shared the campaign]*

GD Triggered Email #7: (Email Shared Deadline Approaching)

Messaging: Sent to anyone the user opted to share with who hasn't joined w/ deadline approaching

Subject Line: Join [Sharer] and create your legacy: just a few days left!

Hi {contact_name} —

[Sharer] has invited you to create an estate plan and establish your personal legacy—for free! This opportunity lasts until [month day]—now is the time to take action.

Giving Docs is an online estate planning platform that helps people take action to support the people and causes they love the most. Our partners at {org_name} recently offered their supporters the chance to create free estate plans with us; now, {Sharer} wants to extend that same opportunity to you!

Traditionally, the estate planning process has been expensive and time-consuming—but it's simple with Giving Docs. Each step is simple and straightforward; you can walk through the process in just a few minutes, and our team is there to help you if you need it. Once you're done, you can revisit or update your documents for free at any time in the future.

Click below to create your legacy!

[Create Your Legacy Button]

With warm regards,
Your friends at Giving Docs

Org Name: *the ACLU*

Sharer: *[Signed up member who shared the campaign]*