



FreeWill + Sigma Pi

Letter to Lawyers

Below, please find a letter to share with local attorneys if they inquire about FreeWill.

Letter

Dear [NAME],

Sigma Pi has recently partnered with FreeWill, a self-help estate planning document software, to bolster our planned giving programs and provide a free resource to our community. We understand that this partnership has raised concerns from local attorneys and wanted to acknowledge and address some of those concerns.

FreeWill, and Sigma Pi, recognize that legal software is no substitute for the advice of experienced counsel. When we first decided to partner with FreeWill, it was made very clear that FreeWill is not a law firm, and does not provide legal advice — rather, the tools are designed to be a “jumping off” point for individuals who have deemed the estate planning process to be too scary, complex, or expensive.

A majority of FreeWill users (about 70%) indicate they do not have any will other than the one they make with the online software. This is to say, users of the software are not choosing FreeWill over a will prepared by a lawyer; rather, they are choosing between FreeWill and no will at all.

Therefore, FreeWill seeks to effectively address some of the legal needs of average Americans through properly researched and designed software. While FreeWill’s free online tools can provide estate planning solutions appropriate for many Americans, they are less suitable for people with more complex situations, such as blended families or particularly large estates.

FreeWill’s sites actively encourage users to seek counsel, and provide them with the option of printing a set of “documented wishes” summarizing their basic estate plan desires, which they can bring with them to their attorney. If one of your clients brings a printout of their documented wishes, it’s because they used FreeWill to get their affairs in order in the comfort of their own home before working with you to establish the legal documents.

All this to say, Sigma Pi wants to support our community, including our local attorneys, to best meet the needs of their clients. Because selecting an attorney can be a daunting process, FreeWill’s site provides users with links to several attorney-finding resources, including the



directory of the ACTEC fellows and the American Bar Association's "Bar Directories and Lawyer Finders" page. **We are open to partnering with your attorney's office to highlight your services to anyone who uses our FreeWill site.**

If you have other questions, I encourage you to visit FreeWill.com/Lawyers to learn more. Thank you for your concerns and feedback — we appreciate the essential work that you do to ensure every person can feel secure in their future.

Take care,
[SIGNATURE]