



## WILL BE DONE

### COMMITMENT TO TEST

This commitment to test includes implementing Will Be Done at \_\_\_\_\_ Credit Union, tracking the results of the implementation, and reporting the results. The purpose of this commitment is to formalize the obligations and expectations of the prototype test.

### Testing Goals

- 10 complete wills in 6 months
- Increase will completions by 4%. (Currently at 45%)
- Survey members to determine next steps.

### Our Commitment to You

The specific activities that Filene agrees to perform for the Will Be Done prototype test:

1. Provide you with language and images to build the landing page.
2. Provide suggested language, materials and images for marketing.
3. Schedule bi-weekly check in calls.
4. Identify your credit union in the final report for the prototype test.

### Your Commitment to Filene

The specific activities that \_\_\_\_\_ CU agrees to perform for the Will Be Done prototype test:

1. Build a landing page for Will Be Done.
2. Market Will Be Done using marketing materials over the course of 3 months.
3. Attend bi-weekly check in calls.
4. Train staff on Will Be Done.
5. OPTIONAL: Identify two attorneys to suggest to your membership to review and finalize the wills.

FILENE RESEARCH INSTITUTE

\_\_\_\_\_ CREDIT UNION

By: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Date: \_\_\_\_\_

By: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Date: \_\_\_\_\_