

Tap into More Revenue with Estate Giving



Laurie Fox
Campaign Director, Will Power,
CAGP





Land Acknowledgment

Our team at CanadaHelps is grateful to have the opportunity to meet and work on many Indigenous homelands across this land we share, Canada.

As settlers on these lands, it is important to acknowledge that our Vancouver offices are located on the unceded territory of the Coast Salish People, the Montreal offices are located on Kanien'kehà:ka (Mohawk) territory, and the land on which we operate in Toronto is the traditional territory of the Wendat, the Anishinaabeg, Haudenosaunee, and the Mississaugas of the Credit First Nation.

We want to express our respect for the territories we reside in and honour the diverse Indigenous People who have lived and worked on this land historically and presently. We, the staff and leadership at CanadaHelps, are committed to being active participants in reconciliation. We are committed to continuing to amplify Indigenous voices, and learning how our work affects Indigenous People.

Vision:

We envision a society in which all Canadians are committed to giving and participating in the charitable sector, and in which all charities, regardless of size, have the capacity to increase their impact.

Mission:

To inform, inspire, and connect donors and charities, and to democratize access to effective technology and education in the charitable sector.

For charities, CanadaHelps builds effective and affordable fundraising technology, and provides free training and education so that all charities, regardless of size, have the capacity to increase their impact and succeed in the digital age.

For Canadians, www.canadahelps.org is a convenient, safe and trusted, one stop destination for donating to (once, monthly, or gifts of securities), fundraising for, or learning about any charity in Canada.

TRUSTED SINCE
2000

\$1.6 BILLION
RAISED

2.6 MILLION
DONORS

24,000 CHARITY
PARTNERS



Promoting strategic
charitable giving to the public:
a major pillar of the
Canadian Association
of Gift Planners (CAGP).

Will Power

Inspiring your donors to leave
a charitable gift in their Will.

Presented in collaboration with:



**There is a huge opportunity before
us. An untapped source of funds
with gifts in Wills.**

Where we need to focus

Awareness: 86% of Canadians are aware

Interest: 63% reject because of either/or barrier ←



Considering: 31% interested



Action: 5% leave a gift in their Will

This is the
biggest effort
in Canada's history
to make estate
giving a social
norm.

 **WILL**
 **POWERTM**

Support a charity in your Will

 **VOLONTÉ**
 **DE FAIRE^{MD}**

Faites un don testamentaire à votre image

Our 10 year goal

5%



8.5%



=

**\$40B
To Charity**

**REMEMBER A CHARITY
IN YOUR WILL**
Help the work live on...

Modelled on success of the [UK campaign](#).



I love my grandson.
But I also love cats.

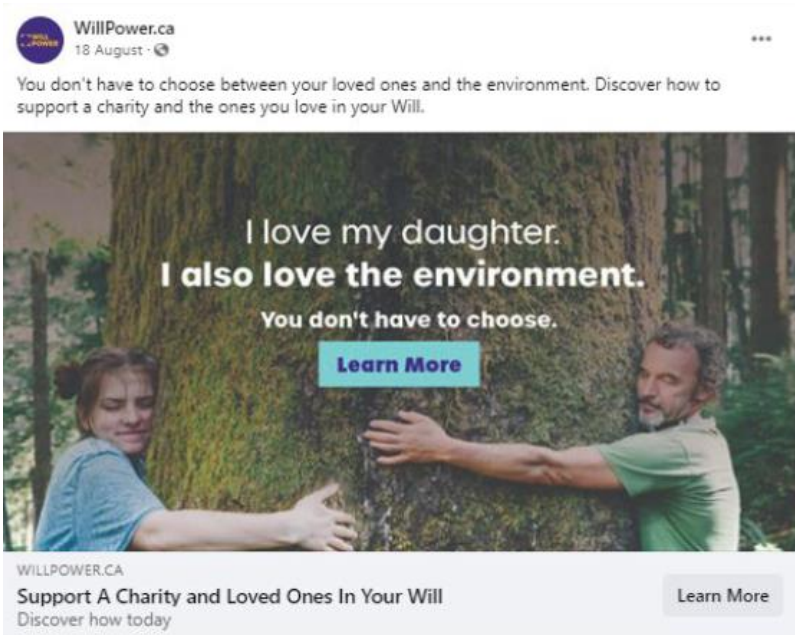
You can have it both ways. Support a charity in your Will and the ones you love. Find out how at Willpower.ca



The Will Power advertising works:

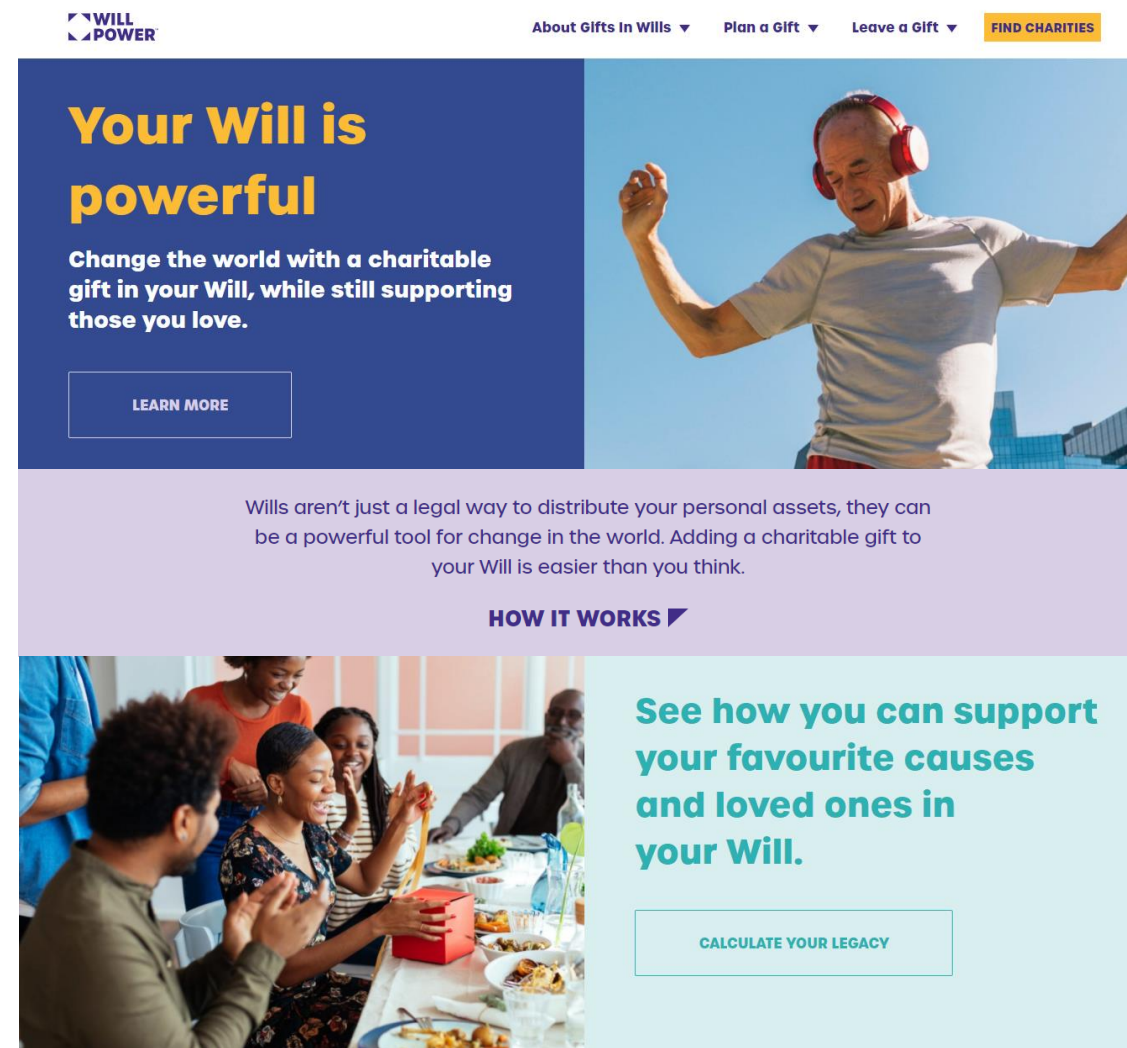
20% of “not interested” changed their minds

83% of “interested” are more likely to take action



Broad-based marketing raises interest:

- Social Media (Facebook, Youtube)
- Banner Ads
- Google Search
- Paid Advertising
- PR (TV, radio, publications)
- Email marketing



WillPower.ca prompts action.



Charitable Gifts in Your Will? | It Doesn't Have to be Hard

[Ad] www.willpower.ca

Discover how to support a charity and the ones you love in your Will. Maximize the power of your Will with our easy-to-use tools.

Are you getting the most out of your Will?

[Take the Quiz](#)

WILL POWER



2020 pilot campaign in Ontario's Niagara Golden Horseshoe saw some very impressive results.

Raising interest:

- **18.2M impressions**
- **53,000 engagements**
- **15 stories in local newspaper, radio, and TV outlets**

Calculate your Legacy

You can make a difference with a gift in your Will to charity, while still taking care of those you love. Use our calculator to see your potential impact.

2. Your gift



\$50,000

Charity donation
5% of your estate

\$950,000

Among beneficiaries
95% of your estate

Find Charities

Browse charities you'd like to include in your Will and add them to your list. When you're ready, we have a handy tool to let your lawyer know about your intentions.

All Locations ▾

All Causes ▾

Search



Engaging and prompting to action:

- **47,180 visits to the website**
- **25% return users**
- **1744 actions to date**

**A collective effort that
benefits us all.**

[◀ Find another Charity](#)

Canadian Red Cross

HEALTH, HUMAN RIGHTS, INTERNATIONAL

About Canadian Red Cross

The Canadian Red Cross is the leading humanitarian organization through which Canadians voluntarily demonstrate their care and compassion for others. We work to improve the lives of vulnerable people by mobilizing the power of humanity in Canada and around the world.

Canadian Red Cross has over 5,000 disaster response volunteers across the country, mobilized during disasters to support individuals, families and communities – providing shelter. food. water. financial assistance and emotional support.

Globally, we have access to a network of Red Cross health teams, able to bring lifesaving care, medicines and supplies into some of the most dire and dangerous regions of the world.

We can deploy our cutting-edge Emergency Field Hospital, staffed by a team of highly trained Canadian doctors and nurses, that can bring lifesaving care to anywhere in the

Add to my charities list



Get started



Tell your lawyer about your Intentions.

Find out more

[➤ Canadian Red Cross website](#)

[✉ wecare@redcross.ca](mailto:wecare@redcross.ca)

1

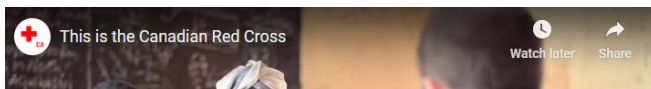
Partners have their own page on the website where users are driven and prompted to action.

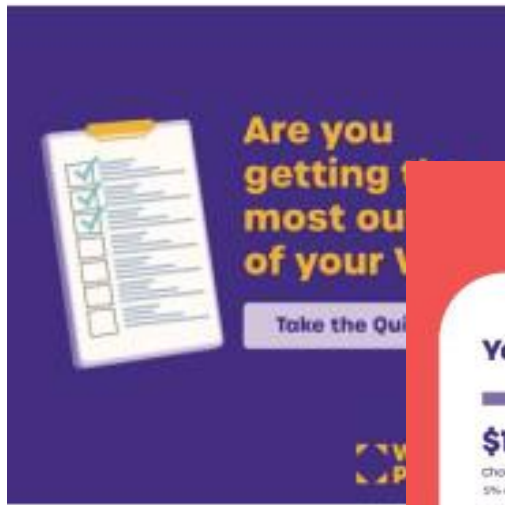
2020 pilot campaign results:

- **10,659 visits to charity pages**

With the average charity seeing:

- **124 visits to their page**
- **37% return visits, staying 2.15 min on page**
- **12 actions taken**





Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna

Eget felis eget nunc lobortis mattis. faucibus purus in. Magnis dis partur montes nascetur. Tincidunt lobortis vivamus at augue.

Penatibus et magnis dis parturient. nascetur ridiculus. Ut aliquam purus. Tortor vitae purus faucibus ornare suspendisse sed nisi lacus sed.



Your gift

\$10,000

Charity donation
5% of your estate

\$19

Average
10%

Hi [Name],

As we announced earlier this month, [Partner name] has joined with more than 80 charities, financial advisors and legal services from across the Hamilton-Oakville-Niagara Region to show Canadians how they can leave a gift to charity in their Will, while still taking care of the ones they love.

We are happy to report that people across the region are responding to our message, recognizing that Wills are not just a legal way to distribute personal assets, but are powerful tools to make change in the world.

If you haven't already, we encourage you to visit Willpower.ca to find out how you can impact [ENTER CAUSE] while still caring for those you love. The website gives you access to a full range of estate planning resources that make charitable giving simple. And we encourage you to get in touch to find out how [Partner name] would put your donation to work.

Thank you for your ongoing support and, as always, if you have any questions or feedback for us, please get in touch.

Thank you,
[Signature]



2

Partners also receive a marketing toolkit to speak to their donors and clients in a different way.

The toolkit includes:

- **Video**
- **Co-branded Will Power ads**
- **Template communications**
- **Key messaging & brand elements**

3

Networking, training, and professional development.

- Charities, financial advisors, and lawyers connect at campaign kick-off and debrief events.
- Charity partners receive one of CAGP's planned giving training sessions.
- Charity partners receive one free CAGP membership.

Ready To Try Something New?



2021 is the last year to sign up as a Founding Partner.

Band	Organization Size*	Annual Partner Fee with 15% discount
J	<\$250k	\$509
I	\$250k-1M	\$2,032
H	\$1-2M	\$3,396
G	\$2-4M	\$4,208
F	\$4-6M	\$5,079
E	\$6-8M	\$6,758
D	\$8-10M	\$8,033
C	\$10-20M	\$8,581
B	\$20-50M	\$8,883
A	> \$50M	\$10,285

* CRA Charity Listing – 3 year average of lines
4500, 4510, 4530, 4575, & 4630 in Schedule 6.

Will Power Launches Across Canada In 2021!

May 31, 2021:
Deadline to register
for 2021 campaign.

June 1, 2021:
Partner training & prep
for 2021 campaign.

Sept 2021:
**Will Power in
communities
across Canada
and in French.**

Oct 2021 – May 2022:
Low key Will Power
marketing.



NATIONAL CONFERENCE CAGP FOUNDATION MEMBER AREA WILL POWER

ABOUT US EVENTS CHAPTERS PROFESSIONAL DEVELOPMENT BLOG WHY JOIN CONTACT US



(Click on the image to visit Willpower.ca)

Leaving a gift in a Will to charity turns the ordinary Canadian into an extraordinary philanthropist. Yet only 5% of Canadians do this.

Will Power is the biggest campaign in our history to make gifts in Wills the social norm. Our goal: to inspire **\$40B in gifts to charities by 2030**.

JOIN WILL POWER AS A CHARITY

JOIN WILL POWER AS AN ADVISOR

[Download the Proposal for Charities](#)

[Download the Proposal for Advisors](#)

Sign-up for the 2021 Will Power campaign at:

www.cagp-acpdp.org/en/will-power



**It's time we open-up
philanthropy in Canada.**

Thank you for leading the charge.

For more information contact:



Laurie Fox, MBA
Campaign Director, Will Power
lfox@cagp-acpdp.org

Khalil Guliwala
Campaign Manager, Will Power
khalilg@cagp-acpdp.org

