

Leave a Legacy Month

Toolkit for charities



CAGP

Alberta North Chapter

Leave a Legacy Month

- What is Leave a Legacy Month?
- Let's get started!
 - Top 5 reasons to participate
 - 5 steps you can take to get going
 - Samples
- For the donor
 - Leaving a legacy
 - 10 steps a donor can do today



Leave a Legacy™, a program of the Canadian Association of Gift Planners (CAGP), is an awareness campaign to highlight the importance of including a charitable gift in the estate planning process.

National Leave a Legacy™ month is the month of May—a great time of year for fresh donor messages!

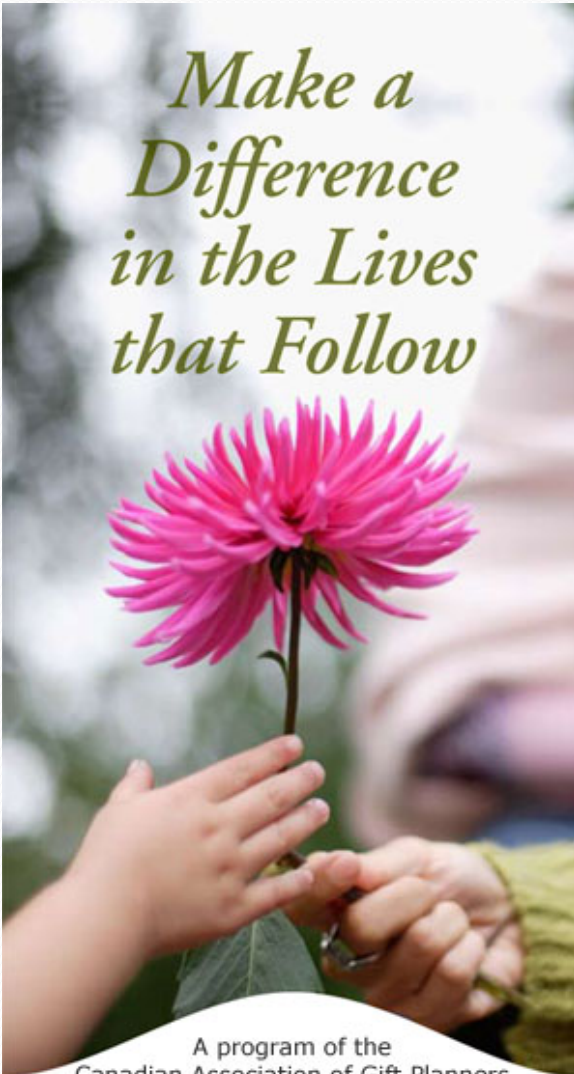
Join CAGP Alberta North in spreading the word.

Did you know?

- 85% of Canadians are donors.
- A bequest in their will is the most common method used by donors to leave a lasting gift to a cause dear to them.
- Less than 10% of Canadians leave a gift to their favorite charity in their will.
- 55% of adult Canadians do not have a will.



*Make a
Difference
in the Lives
that Follow*



A program of the
Canadian Association of Gift Planners

Join us in raising awareness about how donors can make a difference to their favorite causes well into the future.

Help share Leave a Legacy messages and information through your networks in May.

Let's get started!

Top 5 reasons to participate

How to participate

5 Steps to get you going

Top 5 Reasons to Participate

1. Every day, lives are enriched by the work of charities. Your charity can become well supported with legacy gifts.
2. Raise awareness with your staff, volunteers and donors that there is an opportunity in your organization to accept legacy gifts. Instill gift planning culture.
3. Leave a Legacy Month is an excellent time to start a conversation with loyal donors who may be interested in gift planning.
4. Your Leave a Legacy efforts will be promoted by CAGP AB North and our networks.
5. It does not have to be complicated. Sowing a seed now can result in significant revenues down the road.

How to participate

- Use this tool kit to spawn ideas in your organization's communications to your donors.
- Watch for tips in our CAGP Alberta North Bulletin!
- Join our LinkedIn Group, CAGP Alberta North and share your thoughts and experience--stay up to date on your Chapter.
- Follow us on Twitter @CAGPABNorth and share our philanthropic tweets—quotes, messages and links to resources. We will share yours!
- Promote Wills Week October 3-7, 2016! Empower donors to create a will through information sessions sponsored by the Edmonton Community Foundation.

5 Steps to Get You Going

Step 1

- **Choose a Leave a Legacy goal.**
 - Strengthen relationships with existing donors.
 - Build awareness that your organization is open to hearing about estate plans and gift planning.
 - Sow gift planning culture in your organization.

Step 2

- **Think about the messages you want to share.**
 - What are your organizational values? Voice them. Donors are looking for a values match.
 - A legacy gift is a living reminder that donors who care about their community support causes important to them.

5 Steps to Get You Going

Step 3

- **Plan your communications.**
 - What tools will you use to communicate to your donors?
 - How do you want those communications to feel?
 - How do you want your messages to get traction?

Step 4

- **Communicate with donors.**
 - Engage your most celebrated donors in a conversation. Thank them. Let them know their gifts make a difference.
 - Plan some donor visits.
 - Highlight giving and share you donor stories.

5 Steps to Get You Going

Step 5

Leverage your messages

- Share a donor story with us!
- We will share it forward to demonstrate how doable a legacy gift is.
- Share your Twitter feed with us. We will share your tweets.



Sample messages

- What is your vision for your community in 50 years? You can be a part of that vision with a legacy gift.
- Choosing to leave a legacy gift brings meaning, dignity and purpose to a life well lived.
- A legacy gift to [your organization] is a gift that endures and enriches the community.

Sample newsletter ad



What is your vision for your community in 50 years? You can be a part of that vision with a legacy gift.

Choosing to leave a legacy gift brings meaning, dignity and purpose to a life well lived.

Interested? Contact:
Sydney Macdonald
Fund Development Director
Organization/Logo

Sample signature lines

A signature line is an easy way to change up messages that you want to deliver to your external audiences.

Here are a few samples for Leave a Legacy Month (May):

- What is your vision for your community in 50 years? You can be a part of that vision with a legacy gift.
- Choosing to leave a legacy gift brings meaning, dignity and purpose to a life well lived.
- A legacy gift to [your organization] is a gift that endures and enriches the community. For more information....

Sharing your messages

- eNews
 - Leave a Legacy Month is a perfect time to share your donor stories in your eNews. Link them to your website.
 - Share what you are doing with CAGP AB North; we will share too! You might inspire others.
- Facebook
 - Make May the month you share your legacy stories on your Facebook page.
- Twitter Feed
 - Follow CAGP AB North's Twitter feed @CAGPABNorth
 - Follow your colleagues and share legacy hints and tips.

For the donor

Leaving a Legacy

- When considering a will, you will want reassurance that you have enough assets for your future—enough to enjoy your life.
- Once you have that figured out, you might want to explore, with the help of an accountant, the income tax return implications of your estate (even if your estate is modest). There may be capital gains tax or income tax on RRSPs, RRIFs.
- There may be a significant amount of income tax owed to the Canada Revenue Agency (CRA). The CRA becomes a “silent beneficiary” of your estate!

Leaving a Legacy

- The taxes you pay go into general Gov't revenues, so you do not have the opportunity to choose what social good that money will do.
- You can offset your income taxes AND choose where and how you support the community with charitable gifts in your will.
- In your will, instruct your executor to pay all costs and to make a donation(s) to charity that eliminate your income tax liability.

**Now that we have your
attention....**

10 Things a donor can do today

1. Think about the values that are important to your life and ideals for which you want to be remembered. Choose charities that will honor those values.
2. Speak to your family about your values and intentions.
3. Attend a *Wills Week*TM workshop in October to get expert information and advice on creating a will.
4. Ask your financial or estate planning advisor to include a charitable gift as part of your financial plan.
5. Leave a gift of a percentage of your assets to your favorite cause(s).

10 Things a donor can do today

6. Consider naming your favorite cause as a beneficiary in a RRSP, RRIF, pension plan or insurance policy.
7. Consider purchasing a *new* insurance policy and naming your favorite cause as a beneficiary.
8. Remember loved ones with memorial gifts to a cause.
9. Spread the word! Talk to family and friends about the financial and social benefits of leaving gifts to worthy causes in their wills.
10. Create a donor story for your cause about your goals to encourage other donors to leave a legacy gift!

Resources

Questions and Answers about leaving a legacy:

<http://www.leavealegacycalgary.com/questions.htm>

What is a will? Why have one? Check out this link from the Law Society of Alberta:

http://www.lawsociety.ab.ca/public/legal_education/estate_planning.aspx

Planning ahead for your will; Alberta Justice and Solicitor General

https://justice.alberta.ca/programs_services/wills/Pages/PlanningAheadWill.aspx

Association of Fundraising Professionals (AFP) The Donor Bill of Rights

<http://www.afpnet.org/Ethics/EnforcementDetail.cfm?ItemNumber=3359>

Canadian Association of Gift Planners Code of Ethics

https://www.cagp-acpdp.org/sites/default/files/media/code_of_ethics_eng.pdf