



Will Power

2020 Pilot Campaign Debrief Report

Date: December 2020



We've got something here.

The Will Power pilot campaign ran from August 17 to October 9, 2020 in Ontario's Niagara Golden Horseshoe. How did it do? In short, the campaign was a hit.

We saw an enormous amount of attention paid to Will Power and the message we put out there. Messaging that has proven to change minds and increase interest in gifts in Wills.

We also saw a significant amount of people visit the Will Power website, and then return of their own accord. Many of them taking actions like using the legacy calculator, adding a charity to their list, and clicking through to advisors. All confirming that Will Power does the job of engaging the public and moving them along.

It is still early days, and the journey ahead is long, but one thing is clear - we're on the road to success.

Our long term goal

Now: 5% of CDAs
leave a gift in their Will



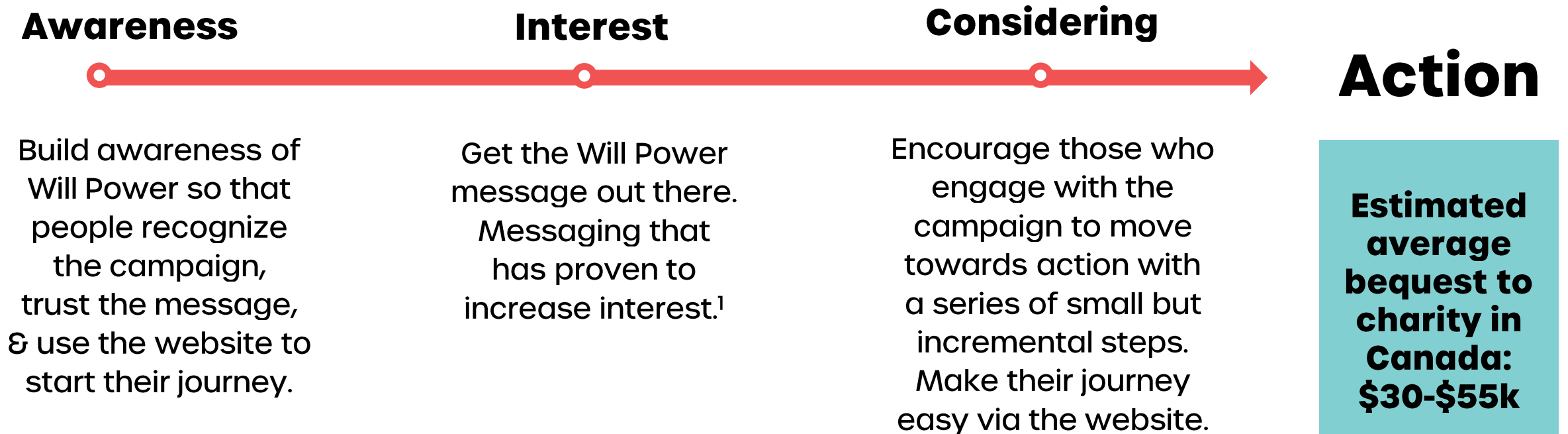
By 2030: 8.5% of CDAs
leaving a gift in their Will



Changing attitudes & behaviours takes time, but the effort is worthwhile.
A modest 3.5% increase will generate

\$40B to charities

Our strategy for getting there



1) See p. 6 for the results of Will Power advertising tests with the public.



2020 campaign results

Reporting for the campaign period - August 17th to October 9th



Before launching the campaign we tested² the Will Power message with the public, and it tested through the roof:

20% of “not interested” changed their minds after seeing an ad

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

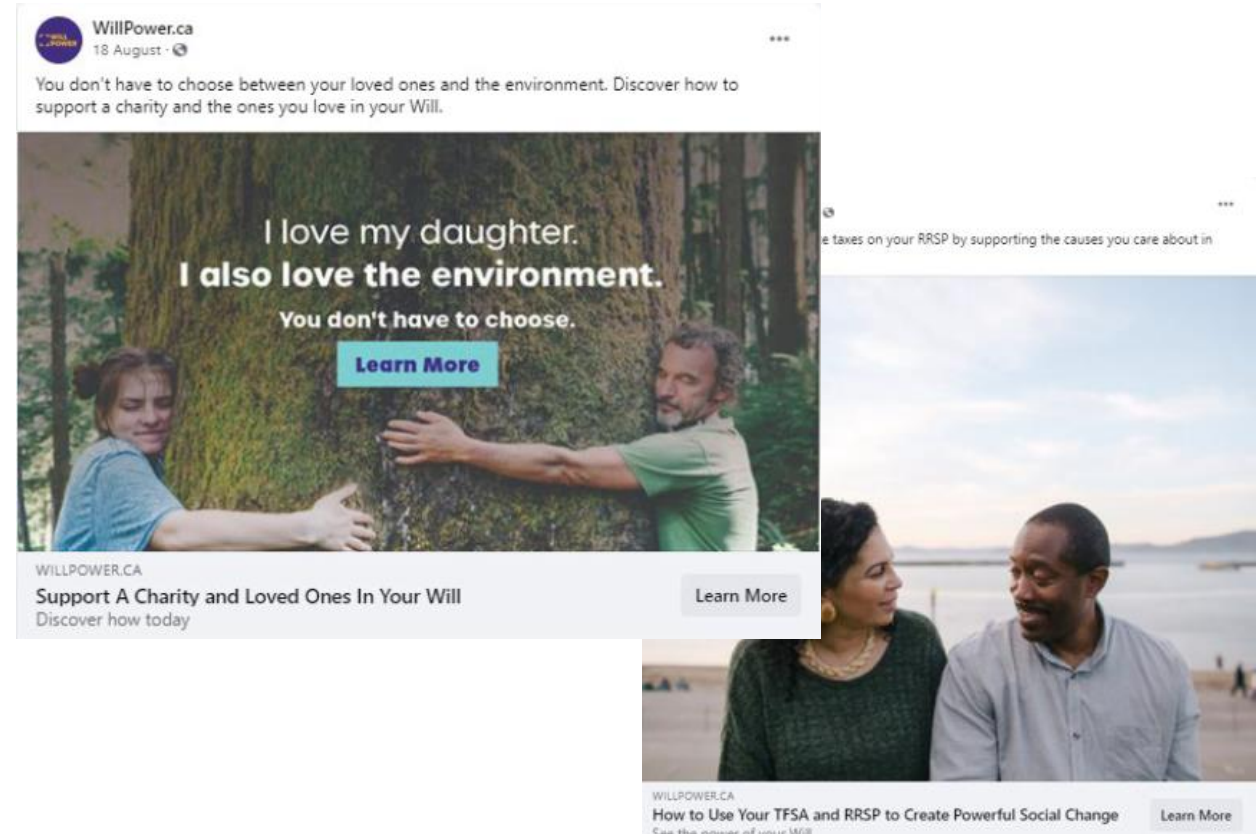
In less than two months of marketing, the campaign saw some very impressive results.

Will Power and its message received an enormous amount of attention, increasing awareness and interest :

- **18.2M impressions³**
- **53,000 engagements⁴**

3) Impressions = views of the Will Power ads, messaging, etc.

4) Engagements = actions like reading an article, clicking through to the website, taking action on the website, etc.



WillPower.ca
18 August · 🌐

You don't have to choose between your loved ones and the environment. Discover how to support a charity and the ones you love in your Will.

I love my daughter.
I also love the environment.
You don't have to choose.

[Learn More](#)

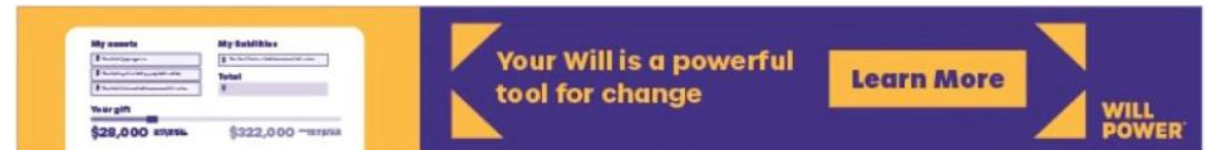
WILLPOWER.CA
Support A Charity and Loved Ones In Your Will
Discover how today

[Learn More](#)

le taxes on your RRSP by supporting the causes you care about in

WILLPOWER.CA
How to Use Your TFSA and RRSP to Create Powerful Social Change
See the impact of your Will

[Learn More](#)



My assets
My liabilities
Your gift
\$28,000 annual
\$222,000 lifetime

Tested

Your Will is a powerful tool for change

[Learn More](#)

WILL POWER

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

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.

NEW CAMPAIGN IN NIAGARA AND GOLDEN HORSESHOE ENCOURAGES INCLUDING CHARITABLE GIFTS IN YOUR WILL



SHELBY KNOX
Tuesday, September 1st 2020 - 9:26 am



LATEST AUDIO

9:35 AM



On air until 6:00 PM
The Tom McConnell Show



10:54 AM
Another record shattering
day for COVID-19 cases in... [More>](#)



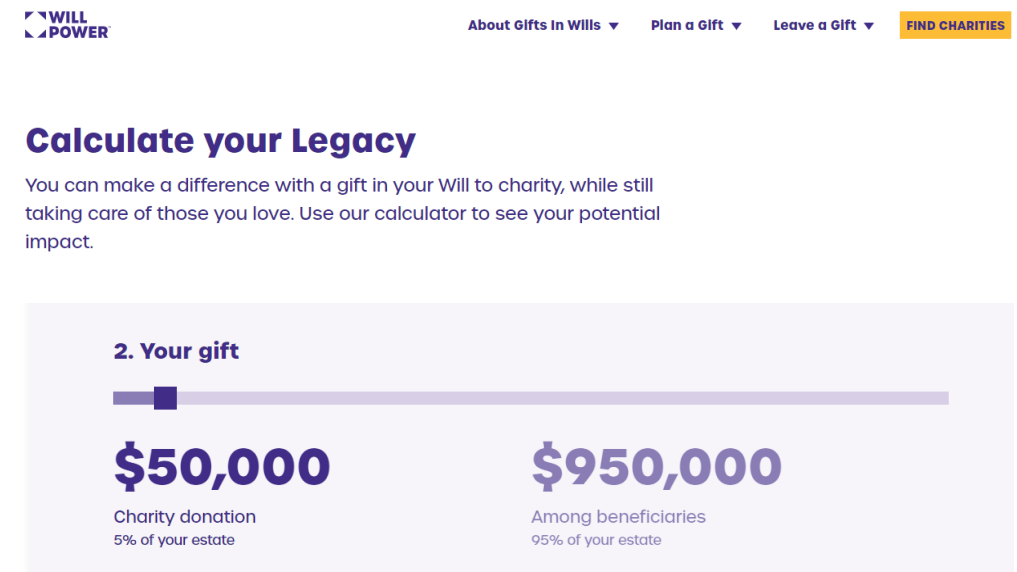
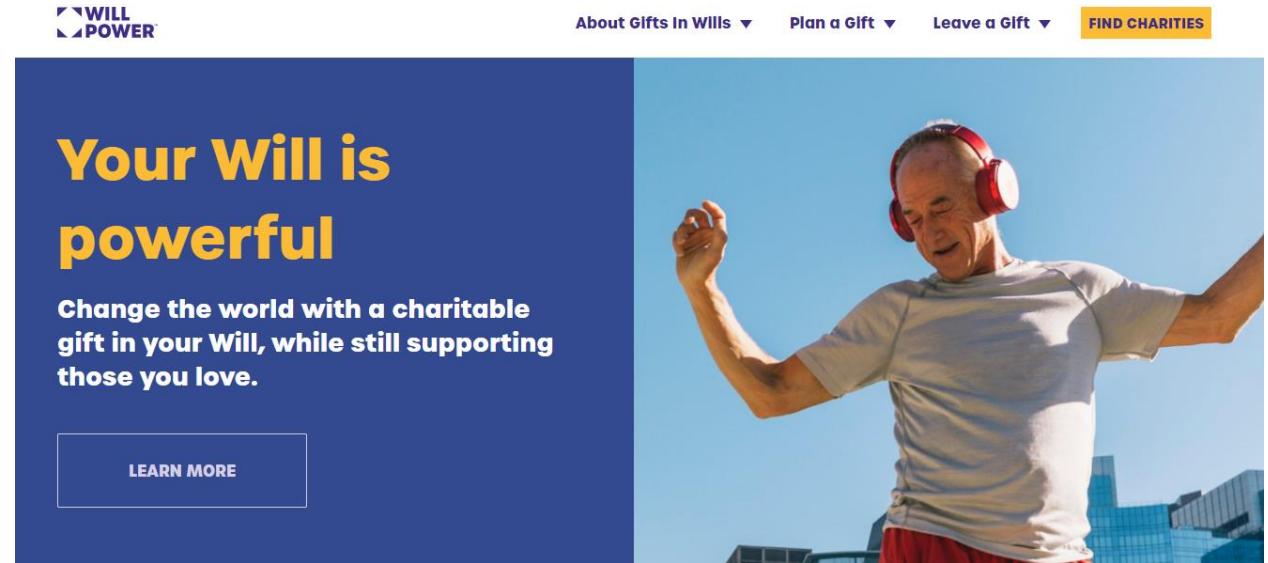
Local media outlets were intrigued and picked-up the campaign, helping to further spread the message and keep the conversation going:

- **15 stories in local newspaper, on talk radio, and on local cable TV**

People began to engage, and then re-engage with the Will Power website, proving it a useful tool for people to take their next steps:

- **47,180 visits to the website**
- **25% were return users**
- **1744 actions to date⁵**

5) Actions = using the legacy calculator, adding a charity to one's list, clicking through to the online intention form, etc. (Reporting from Aug 17 – Nov 3.)



Lesson learned

- 1 We know that the Will Power message works to increase interest in gifts in Wills. But once people's interest is piqued, once they see that they can give to loved ones and charity in their Wills, we've learned that personally relevant information is most popular, i.e. advisor articles on the Will Power website. We will be creating more of this type of content in the 2021 campaign.

- 2 We also know that providing information alone will not move people to action. Recent research shows that 95% of donors who ask for legacy giving information from charities don't end up leaving a gift in their Will⁶.

Instead, we've learned that it is more effective to ask people to take a series of small actions that build up to big commitments. We will be building out our series of nudges in the 2021 campaign.

- 3 Our partners play a really big role in getting the message out there. They speak to engaged donors/clients, and are sought after spokespeople in the media. We plan to open up more opportunities in Will Power for our partners in the 2021 campaign.

6) R. Wishart, Dr. R. James. The Final Outcome of Charitable Bequest Gift Intentions. 2020. <https://doi.org/10.1002/nvsm.1703>



Results for partners

Reporting from August 17th to November 3rd (11 weeks)

Overall results for partners

Users are exploring Will Power charities while exploring gifts in Wills.

**10,659 visits to Will Power charity pages
(our 3rd most popular page)**

A number have indicating interest in Will Power charities as they move to consideration.

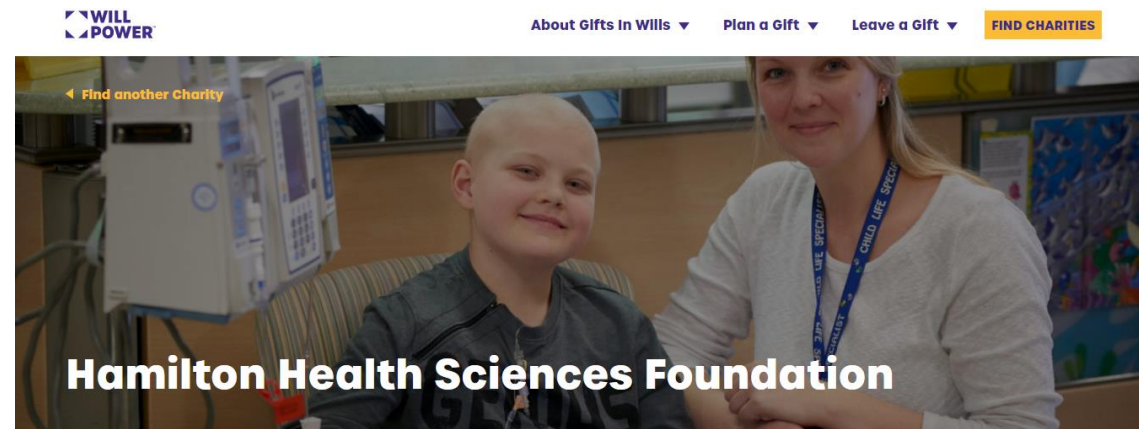
754 added a charity to their list, clicked-through to the intention form, etc.

Users are looking into planning a gift in their Will and exploring Will Power advisors along the way.

2392 visits to Will Power advisor pages

On average, charity partner pages saw:

- **124 page visits**
- **37% were return users**
- **2.15 min on a page**
- **12 actions were taken**
(i.e. adding a charity to a list, clicking through to intention form)



HEALTH

About Hamilton Health Sciences Foundation

Hamilton Health Sciences Foundation provides vital funding to enable the best possible patient care. We inspire and motivate gifts that fund medical equipment and patient amenities, innovative research initiatives, essential redevelopment of clinical care spaces, and the education and training of health care providers.

As a registered charitable organization, we proudly support patients and families across Hamilton Health Sciences including:

- Hamilton General Hospital, including the Regional Rehabilitation Centre
- Juravinski Hospital and Cancer Centre
- McMaster Children's Hospital, including Ron Joyce Children's Health Centre and McMaster University Medical Centre
- St. Peter's Hospital
- And their associated programs

Hamilton Health Sciences is the only hospital system in Ontario providing specialty health care for the full spectrum of life's journey, from pre-birth to end-of-life. It serves a region of more than 2.3 million residents and provides highly specialized care to patients from outside the region as a provincial referral centre. Hamilton Health Sciences is a leader in many specialized acute and chronic care programs for pediatric and adult patients across

Add to my charities list

Get started

Tell your lawyer about your Intentions.

Find out more

Hamilton Health Sciences Foundation website

gemmellc@hhsc.ca

905-575-6383

Charity Number
13115 9543 RR0001



On average, advisor partner pages saw:

- **62 page visits**
- **12% were return users**
- **0.89 min on a page**
- **5 actions were taken**
(i.e. contact an advisor)



Jennifer Stebbing, CPCA

Ross & McBride LLP

About Jennifer Stebbing, CPCA

Jennifer Stebbing is a Partner, and practices predominantly in the area of estate planning, administration and accounting. She focuses on ensuring her clients wishes are respected after they pass away. Since her call to the bar in 2009, she has practiced in estate law; first as a litigator and now as a planner and administrator. Focusing on the issues of the elderly has allowed her to specialize in assisting clients with the transition from working to retirement and beyond. She is uniquely situated to assist with any planning needs given her designation as a Certified Professional Consultant on Aging (CPCA). Jennifer completed her Bachelor of Arts (Honours) at the University of Windsor in International Relations and went on to complete two law degrees with cum laude honours at the University of Ottawa and Michigan State University with a specialization in International Law. She participated in various moots and worked on two journals: the Michigan State University College of Law International Law Review and the University of Ottawa Law and Technology Journal. Jennifer completed her LL.M. specializing in Tax at Osgoode Hall Law School in June 2019. Jennifer is a volunteer at heart and is involved in many different local organizations and spends her spare time hiking and participating in various community events.

Typical Clients

My typical client wants to complete their will to ensure their wishes are known and abided by after they pass away.

Articles by Jennifer



The 5Ws of Will Writing

14

Contact Jennifer about adding a charity donation to your will

Don't worry, we'll help with all the details.

SEND A NOTE

✉ jstebbing@rossmcbride.com

☎ 905-667-6407

➦ [Jennifer's website](#)

Top performers leveraged the campaign - using the marketing toolkit to kick-start legacy conversations with donors/clients, or as a different way to engage their constituents.

UNICEF Canada Sponsored

Your Will is a powerful tool. More about leaving a charitable gift in your Will while still supporting the ones you love.

Next Steps Planning with IPC Securities
Published by Heleen Phillips-Campbell [7] · September 23 ·

WillPower Wednesday
Changing the world one Will at a time. <https://www.willpower.ca/advice>

Stand Up for Kids
Published by Anne Oldenburg [7] · 8d ·

Children's Aid Foundation of Canada is joining more than 80 charities, financial advisors, and legal services in Ontario to show Canadians how they can leave a gift to charity in their Will, while still taking care of the ones they love. Learn more: https://www.willpower.ca/.../childrens-aid-foundation-of-can...

I believe in my children. I also believe in a better world.
You don't have to choose. Support a charity and the ones you love in your Will.

WWW.WILLPOWER.CA
Your Will is powerful. Adding a charitable gift to your Will.

I love my family. I also love vulnerable young people.
You don't have to choose when leaving a gift in your Will.

Stand Up for Kids
Support a charity in your Will.

Wed 9/9/2020 4:46 PM
Community Giving <communitygiving@davidsuzuki.org>
TEST | Protect the planet and your loved ones

To: Tory Nam

If there are problems with how this message is displayed, click here to view it in a web browser.

DAVID SUZUKI FOUNDATION
One nature.

"It's our duty to do everything possible today and into the future to safeguard nature and our children's future. We know we'll never stop fighting to protect what we all need to survive." ~ Tara Cullis

Dear friend,

In these extraordinary times, I'm reminded about what matters. *Nature matters.* Healthy ecosystems are the basis of well-being.

Recovery from the COVID-19 crisis is an opportunity. Let's reimagine humanity's relationship with nature. Let's create a world where people are more connected to everything that keeps us alive, from food and shelter to the natural systems that give us air, water and soil.

Will Power, a free service for you

To help you plan your legacy, we've partnered with [Will Power, an exciting new free initiative](#). Use the Will Power website to:

- Calculate your legacy gift.
- Connect with professional advisers.
- Select the charity of your choice — and we'd love it to be us!

[Take me to Will Power](#)

Of course, you don't have to tell us if you chose the Foundation as your charity. But if you want to, we'd be thrilled to know so we can thank you. If you like, please contact me at tnaim@davidsuzuki.org.

Arthritis Society

About Arthritis Treatment Living Well Support & Education About Us Get Involved Donate

This September, the Arthritis Society is joining more than 80 charities, financial advisors, and legal services in the "[Will Power](#)" campaign to show Canadians how they can leave a gift to charity in their Will, while still taking care of the ones they love.

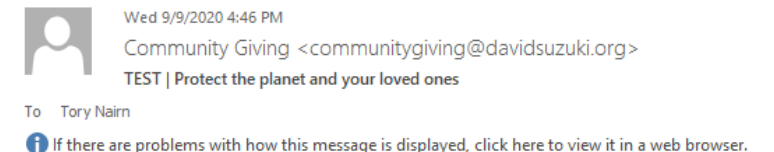
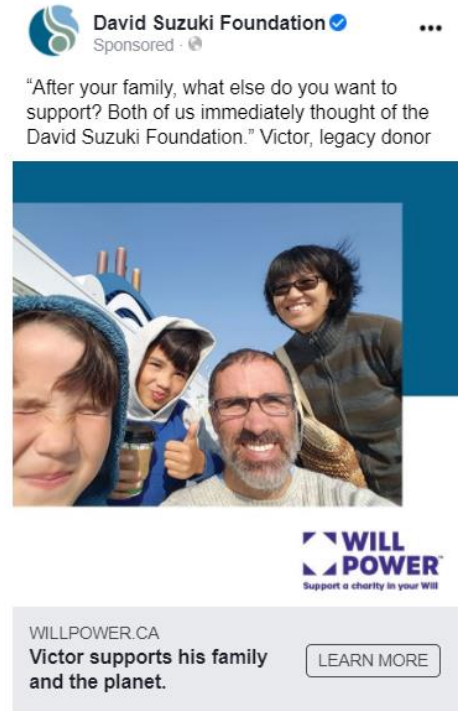


Case Study: David Suzuki Foundation

The David Suzuki Foundation is an environmental charity with a large donor database, and existing legacy fundraising program.

The Foundation tested Will Power as a different way to get the message out to donors who've indicated they are thinking about a gift in a Will, as well as other likely candidates. Pairing the Will Power key messaging with a donor story, and framing the Will Power website as a useful tool for donors, they sent a series of 3 emails in addition to messaging included in their newsletter. They also did organic and paid ads on social media. The results?

- 3765 pageviews on their Will Power webpage
- 67 actions taken on their Will Power webpage
- Strong acquisition on social media
- Surprise confirmed bequest



Will Power, a free service for you

To help you plan your legacy, we've partnered with [Will Power, an exciting new free initiative](#). Use the Will Power website to:

- Calculate your legacy gift.
- Connect with professional advisers.
- Select the charity of your choice — and we'd love it to be us!

[Take me to Will Power](#)

Of course, you don't have to tell us if you chose the Foundation as your charity. But if you want to, we'd be thrilled to know so we can thank you. If you like, please contact me at naim@davidsuzuki.org.

Launching in communities across Canada
September 2021!

 **WILL
POWER™**

2021 campaign timeline



A horizontal timeline with a teal line and circular markers. The timeline starts with a yellow horizontal bar above the title. The markers are positioned at Jan 2021, May 31, 2021, June 2021, Sept 2021, and Oct 2021 onward. The Sept 2021 marker is highlighted with a red rectangular box.

Jan 2021:
National campaign
announcement. Partner
sign-up begins.



May 31, 2021:
All partners signed-up
for 2021 campaign.

June 2021:
Partner training & prep
for 2021 campaign.

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



Oct 2021 onward:
Low key Will Power
marketing year-round.

Join as a Founding Partner

When you join the 2021 campaign you become a Founding Partner. In thanks, we offer you preferred placement on the website and a 15% discount for as long as you're a partner in the campaign.

Band	Organization Size*	Annual Partner Fee with 15% discount
A	> \$50M	\$10,285
B	\$20-50M	\$8,883
C	\$10-20M	\$8,581
D	\$8-10M	\$8,033
E	\$6-8M	\$6,758
F	\$4-6M	\$5,079
G	\$2-4M	\$4,208
H	\$1-2M	\$3,396
I	\$250k-1M	\$2,032
J	<\$250k	\$509
Advisors		CAGP Membership, \$375

*Organization size is based on a 3 year average of donation revenue. We use as a guideline, your tax file on the [CRA Charity Listing](#) - lines 4500, 4510, 4530, 4575, & 4630 in Schedule 6.

Partner Benefits:

- 1** Exposure to new audiences. Dedicated page on the Will Power website, where we drive traffic.
- 2** Tools to speak with donors/clients. Marketing toolkit including video, co-branded creative, & 2 template communications.
- 3** Gift planning know-how. One free CAGP membership. One free CAGP intro to gift planning training.



**We have an opportunity to
open-up philanthropy in Canada.**

Thank you for leading the charge.

For more information:

Laurie Fox, MBA
Director, Will Power
416-797-2180

lfox@cagp-acpdp.org
www.willpower.ca