



Will Power

Inspiring more Canadians to leave a
charitable gift in their Will

Information in this proposal is subject to change as the campaign develops.

We have an opportunity to create more social good.



Canadian charities are needed now more than ever. Charities are first to help the most vulnerable in our communities, in times of crisis and beyond.

Yet as demand on charities increases, funding for charities to keep pace has declined. Imagine Canada's Chief Economist predicts that by 2026, the charitable sector will need \$25B to meet a spiking demand for services.¹

The good news is that there is a *huge* opportunity before us. An untapped source of funds via gifts in Wills.

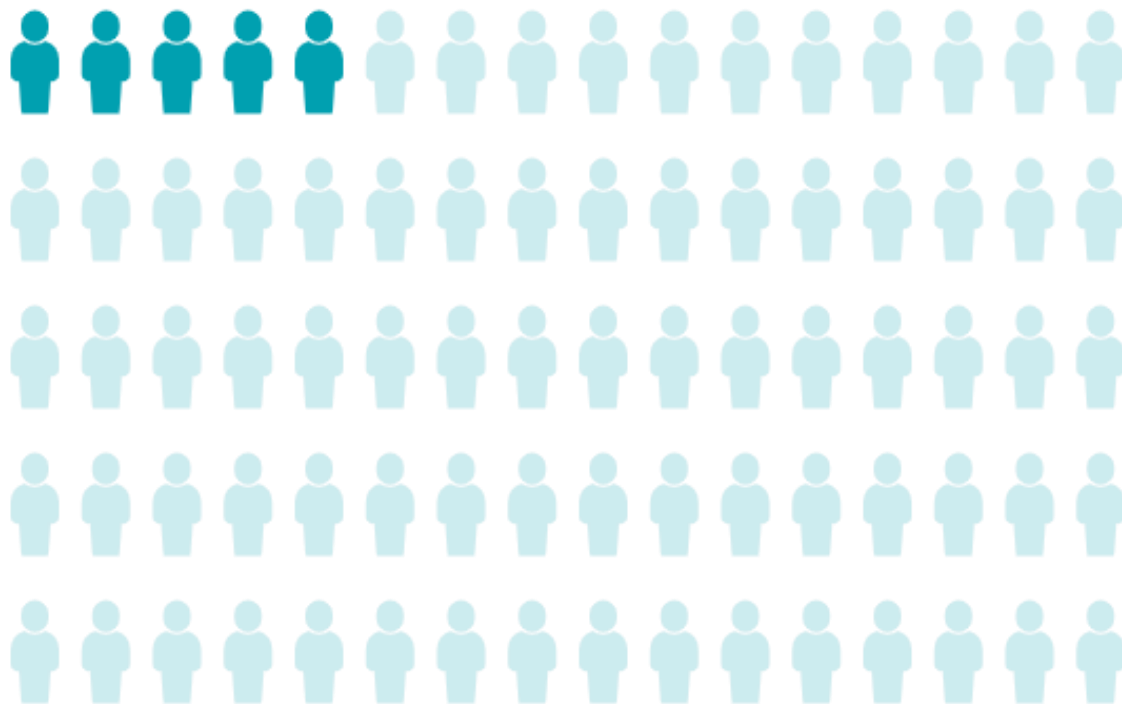
Where most types of charitable giving shrink during economic downturn, history shows that estate giving is the one area that can grow.² Encouraging even a small percentage of Canadians to set aside a portion of their estate for the causes they care about, could result in billions more for charities to do social good.

Currently, very few Canadians leave a gift in their Will to charity. We want to change that.

1. Brian Emmett. 2018. The Impact Of An Emerging Social Deficit On Charities And Non-Profits. Imagine Canada
2. Swank, Katherine & Quevli, Michael. 2011. Prospect Research for Planned Gifts. Blackbaud.

Where Are We Now?

5%



Our 2019 [research](#) shows that only 5% of Canadians leave a gift in their Will to charity.
(A number that has not changed much in over 15 years!)

THE BIGGEST BARRIERS:

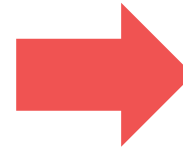
- 1) 63% of Canadians aren't interested, and immediately reject gifts in Wills over the belief they take away from loved ones.
- 2) 31% of Canadians are interested but don't act. This due to indecision over charities, lack of time, and general inertia.

In 10 Years, Where Do We Want To Be?

8.5%



By 2030, we'll inspire 8.5% Canadians to leave an estate gift to charity.



**\$40B
To Charities**


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

Modelled on the [Remember a Charity](#) campaign that successful moved the dial forward on legacy giving in the UK.

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



Support a charity in your Will



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

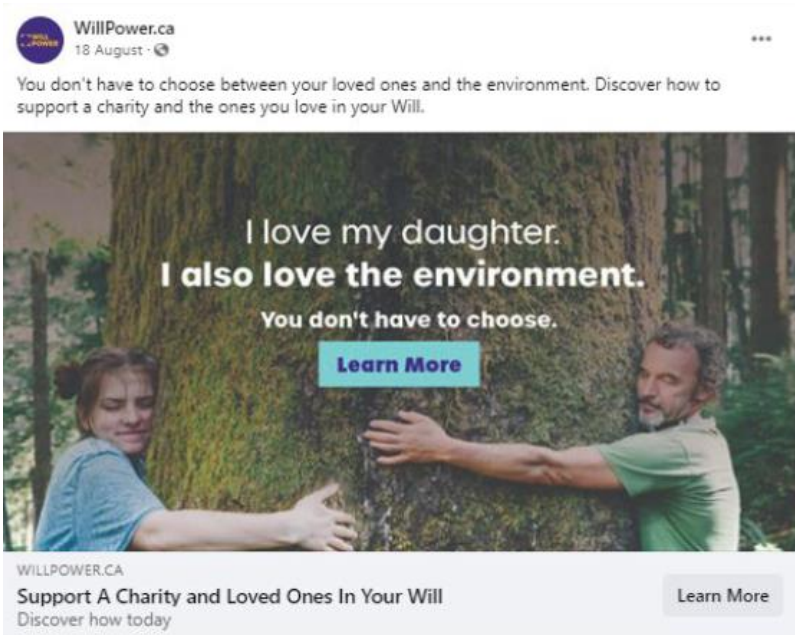


The Will Power message was tested³ across Canada, and proved enormously successful at increasing interest:

20% of “not interested” changed their minds

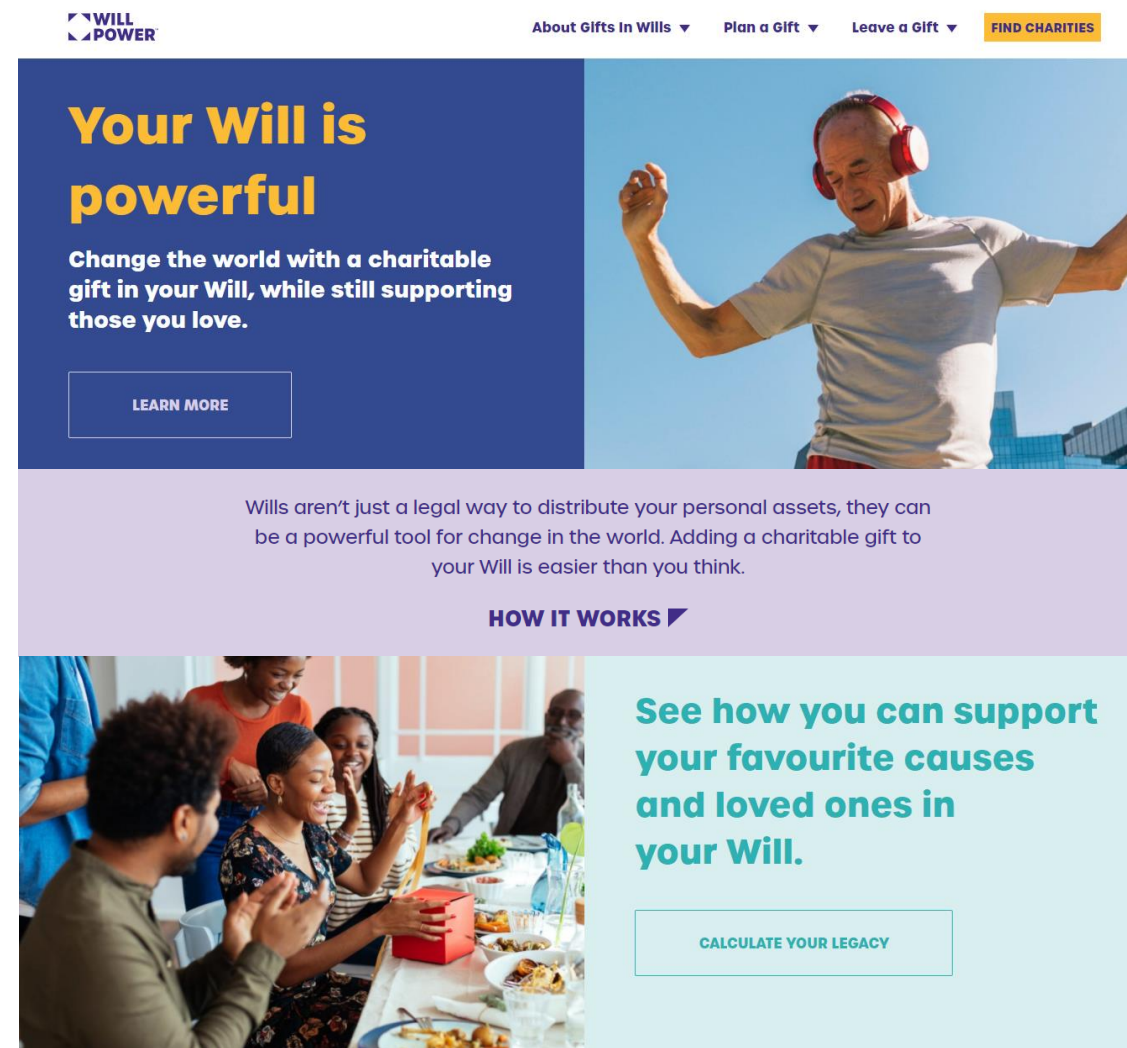
83% of “interested” are more likely to take action

3. Focus group conducted by Polaris in May 2020.



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



In the fall of 2020 we piloted the campaign in Ontario's Niagara Golden Horseshoe.

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

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

- **18.2M impressions⁴**
- **53,000 engagements⁵**
- **15 stories in local newspaper, radio, and TV outlets**

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

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

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



PUBLIC BENEFIT
Oakville Public Library
OAKVILLE



ARTS & CULTURE
ArtHouse for Children and Youth
OAKVILLE



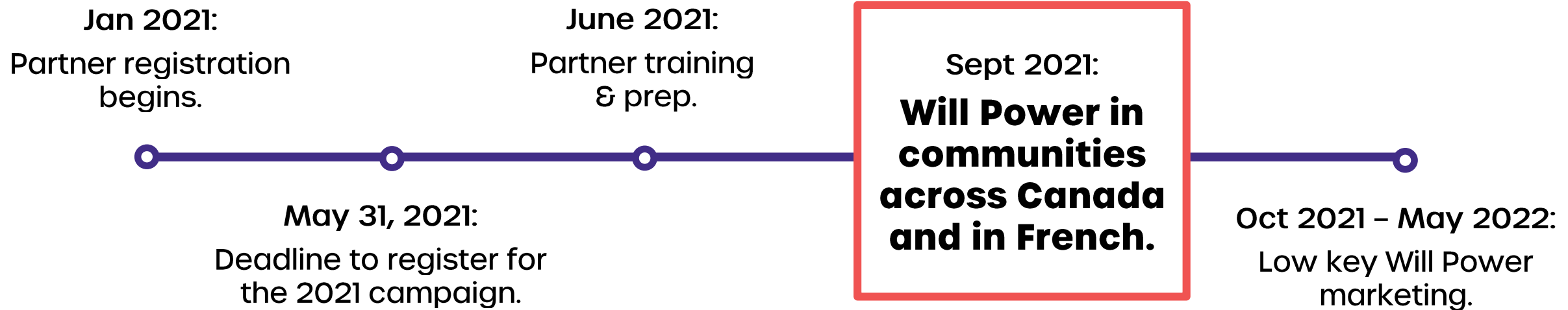
ENVIRONMENT
Greenpeace
NATIONAL

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

- **47,180 visits to the website**
- **25% return users**
- **1744 actions to date⁶**


6. Actions = using the legacy calculator, contacting an advisor, adding a charity to one's list, clicking through to the intention form to lawyers, etc.

Will Power Launches Across Canada In 2021!



Estimated reach for the 2021 campaign: **53M impressions across Canada**

“The rising tide lifts all boats”



Making gifts in Wills the social norm is something no one entity can do alone. It requires a collective effort.

Will Power is created, sustained, and propelled by charities and professional advisors.

We're a group who believes that charities play a crucial role in addressing our society's most pressing needs. And we believe that gifts in Wills hold the potential to open-up philanthropy so that charities can do more social good.

When you join Will Power, you grow the pie for the charitable sector as a whole. And in return, we help you capture a piece of that pie for your organization.

[◀ 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

1

Charity partners have their own page on the website where users are driven and encouraged to take action.

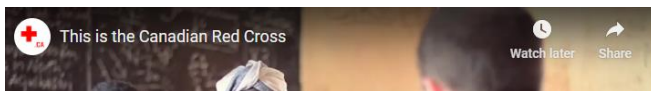
In the 2020 pilot campaign, in just 11 weeks, we saw:

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

The average charity seeing:

- **124 visits to their page**
- **37% return visits, staying 2.15 min on page**
- **12 actions taken⁷**

7. On average charities saw most users adding them to their list, and clicking through to the intention form to lawyers.





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



Hi [Name],

As we announced earlier this month, [Partner name] has with more than 80 charities, financial advisors and legal voices from across the Hamilton-Oakville-Niagara Region show Canadians how they can leave a gift to charity in a 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 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 questions or feedback for us, please get in touch.

Thank you,
[Signature]



2

Charity partners also receive a marketing toolkit to speak to their donors in a different way.

The toolkit includes:

Video

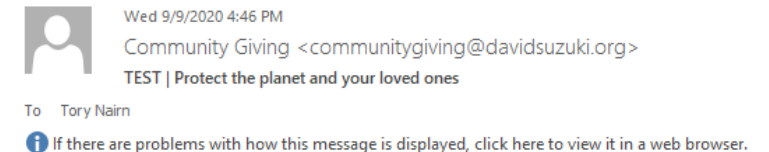
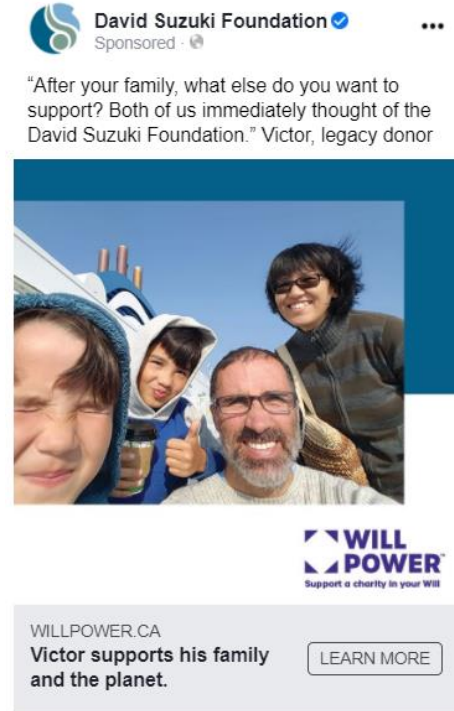
Co-branded Will Power ads

Template communications
(email & Facebook format)

Key messaging & brand elements

Case Study: David Suzuki Fdn

- 41,000 active donors across the country, an existing legacy fundraising program
- Used the marketing toolkit to create a series of email and social media posts. Sent to 6000 donors
- 3765 visits on their Will Power webpage
- 67 actions taken
- Plus one confirmed bequest & new acquisition on social media



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 tnairn@davidsuzuki.org.

3

Partners also connect with like-minded professionals, and receive planned giving education.

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

Ready for something new?

When you join the 2021 campaign you become a Founding Partner and join us for the first steps of Will Power. 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
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

Partner Benefits:

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

*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.



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

Thank you for leading the charge.

Join the 2021 Will Power campaign as a charity partner:

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

For more information contact Laurie Fox, Campaign Director:

lfox@cagp-acpdp.org

