Will Power

Inspiring More Canadians to Leave an Estate Gift to Charity

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, gifts of life insurance, and other types of estate gifts.

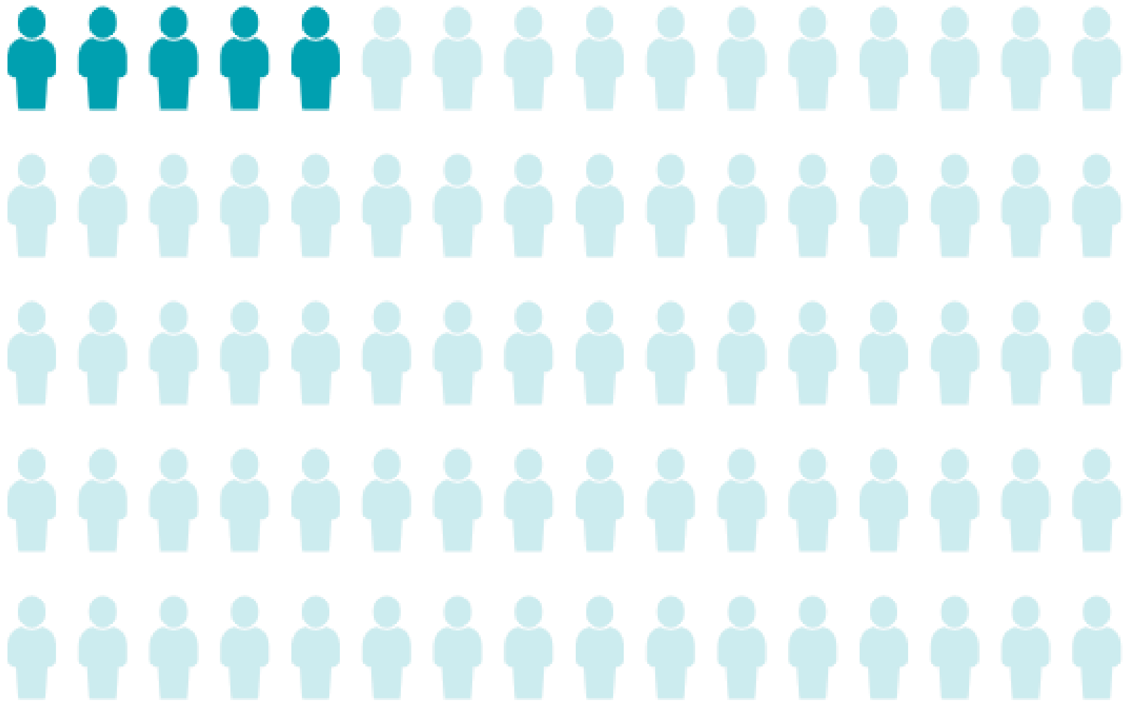
Where most types of charitable giving shrink during economic downturn, history shows that estate giving is the one area that can grow.[2] Encouraging even a small percentage of Canadians to set aside a portion of their estate for the causes they care about, could result in billions more for social good.

Currently, very few Canadians leave an estate gift 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.

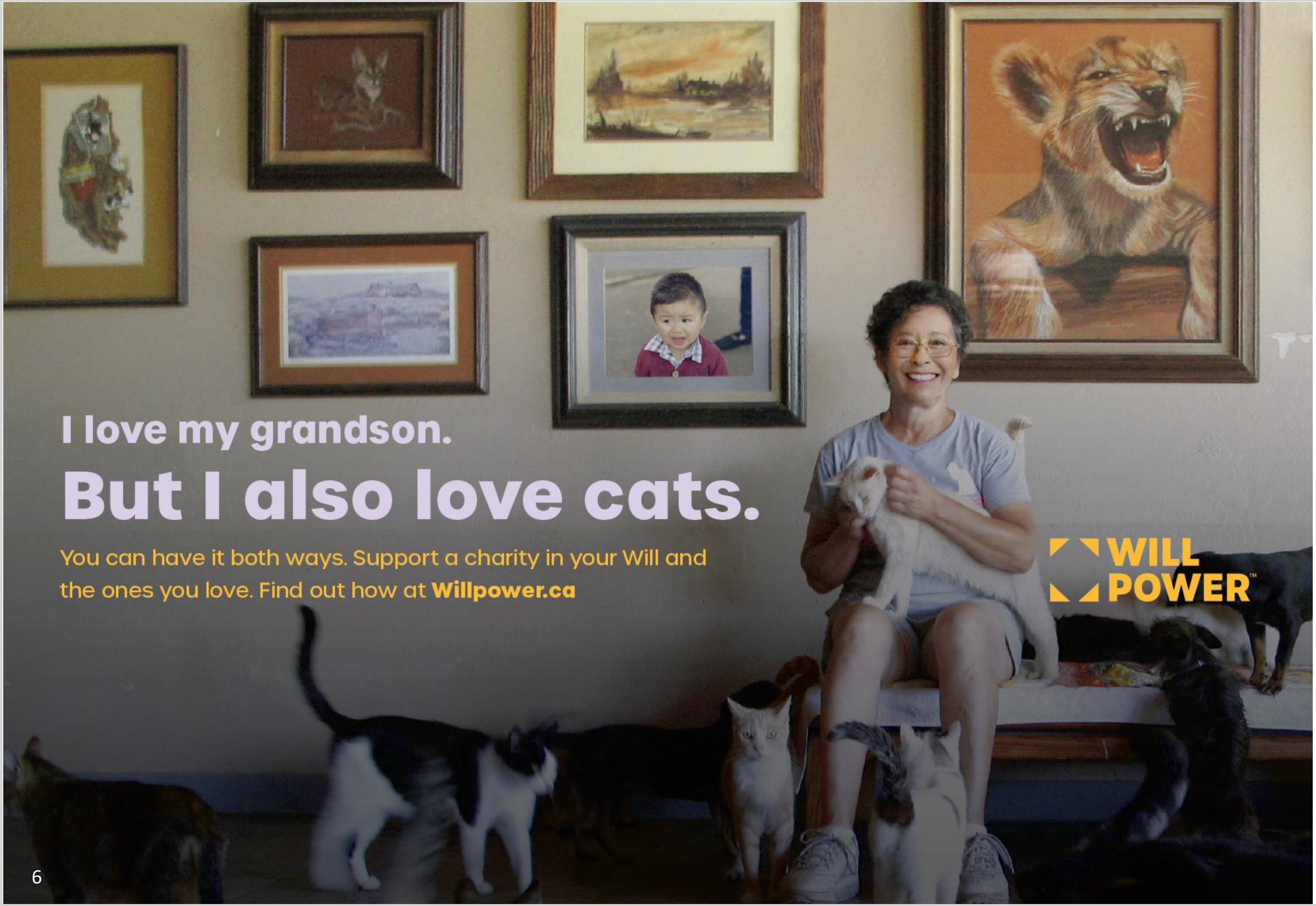
$40B To Charities

Modelled on the Remember a Charity campaign that successful moved the dial forward on legacy giving in the UK.

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

WILL POWER™

Support a charity in your Will

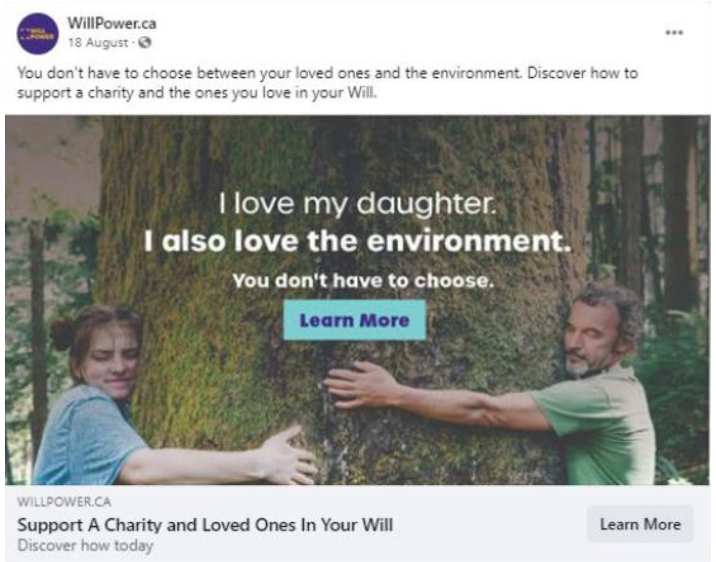


The Will Power message was tested[3] across Canada, and proved enormously successful at increasing interest:

20% of "not interested" changed their minds

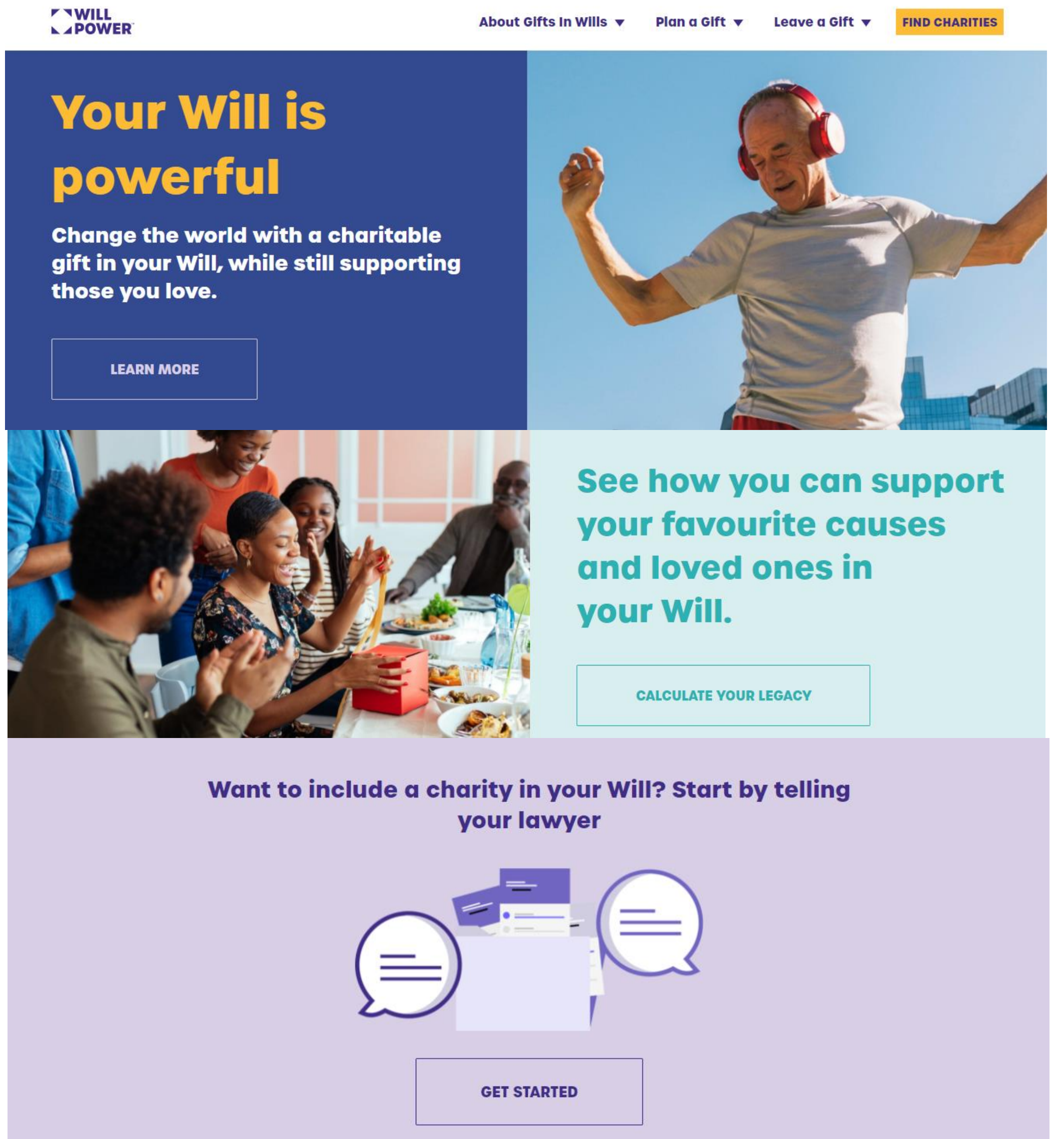
83% of "interested" are more likely to take action

3. Focus group conducted by Polaris in May 2020.



The campaign spreads the message via broad-based marketing:

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

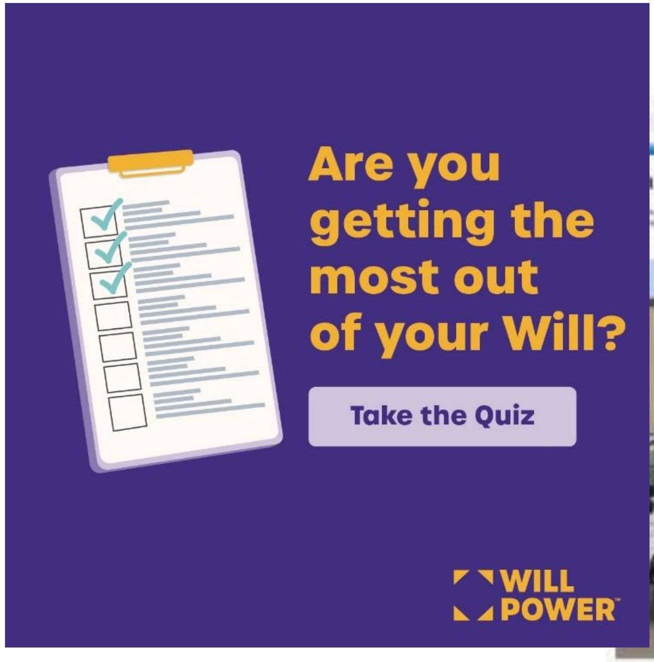


Then prompts people to action at WillPower.ca, a one-stop shop for everything bequest.

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.



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

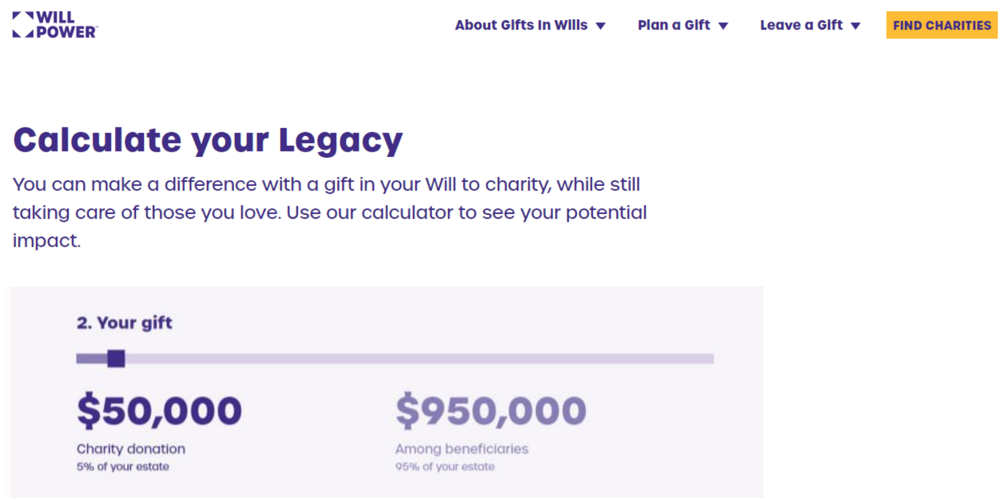
In less than two months of marketing, we saw some very impressive results.

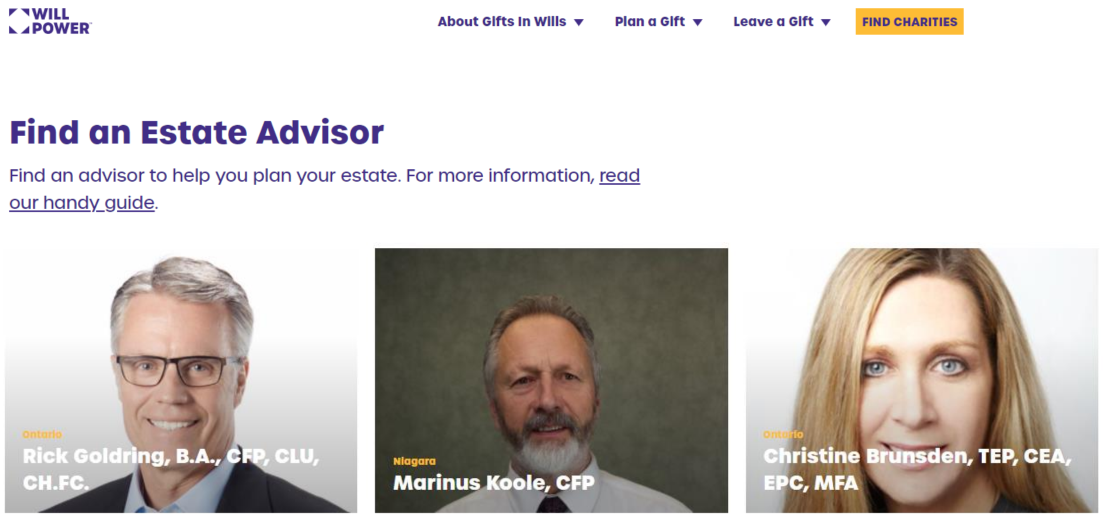
Will Power and its message received an incredible amount of attention, increasing interest:

- **18.2M impressions**[4]
- **53,000 engagements**[5]
- **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.





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 date[6]**

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!

Jan 2021:
Partner registration begins.

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

June 2021:
Partner training & prep.

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

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

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

Doing good is good for business.

Making estate giving the social norm is something no one entity can do alone. Behaviour change of this kind requires the collective effort of charities, financial advisors, and legal professionals.

Research shows that when clients are prompted to leave a gift in their Will, charitable bequests increase by 120%[4].

Research also shows that clients *want* to engage in the philanthropic conversation when planning their estate. In fact doing so results in greater client satisfaction, longer relationships, and new clients[5].

Advisors in Will Power, therefore, not only help to increase the resources available to create more social good, they also receive exposure and resources to promote their business.

4- Applying Behavioural Insights to Charitable Giving. Behavioural Insights Team. UK. 2013
5 - The Philanthropic Conversation. CAGP et al. 2014.

WILL POWER

About Gifts In Wills ▾ Plan a Gift ▾ Leave a Gift ▾ FIND CHARITIES

Rick Goldring, B.A., CFP, CLU, CH.FC.

Wealth and Risk Management Advisor, The Bay West Group Inc.

About Rick Goldring, B.A., CFP, CLU, CH.FC.

For more than 30 years as a wealth advisor, I've learned that one of the most important aspects of my role is offering peace of mind and confidence when it comes to your financial future. It starts with a strategic road map that clarifies your current needs and future goals to ensure you're looked after at every step of the way. Each personalized plan has a wealth and risk management strategy that is carefully constructed to find the right solutions at the right time for you, your family and your business. I also work hard to ensure there's a comprehensive estate plan for your family, that leaves the lasting generational security you want, a retirement income plan for comfortable living and a charitable giving plan for an impactful legacy.

rgoldring@baywestgroup.com

905-320-3656

Rick's website

Typical Clients

I provide Financial Leadership to successful business owners including doctors and dentists, allowing them to meet their goals by taking a comprehensive approach to

1

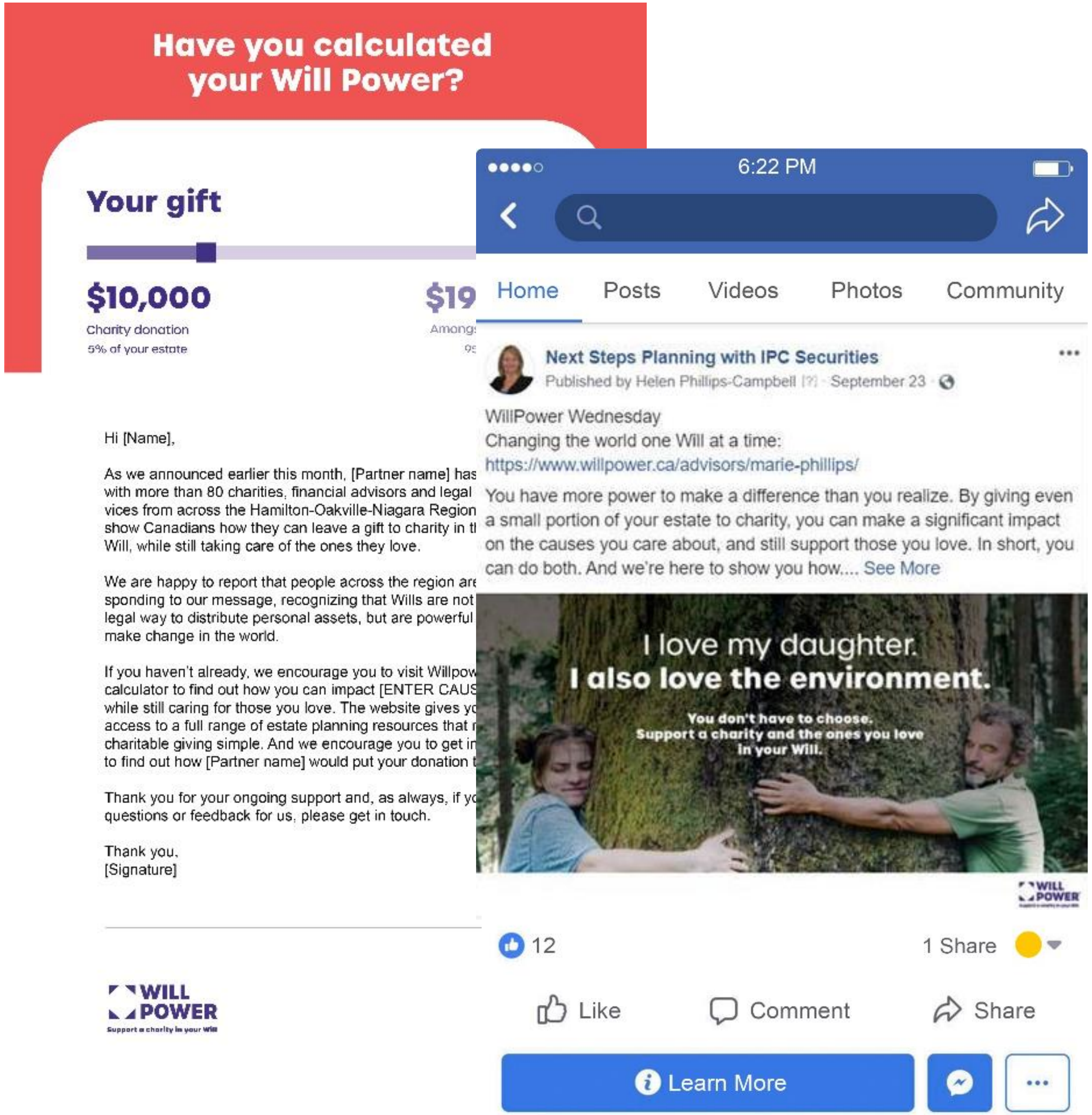
Advisor partners have their own page on the website where users are driven and encouraged to take action.

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

- **2392 visits to the advisor pages**

The average advisor seeing:

- **62 visits to their page**
- **12% were return users**
- **5 clicked-through to contact**



2

Advisor partners also receive a marketing toolkit to speak to their clients in a different way.

The toolkit includes:

Video

Co-branded Will Power ads

Template communications
(email & Facebook format)

Key messaging & brand elements

3

Advisor partners connect with like-minded experts, and receive free professional education.

- Advisor partners connect with like-minded financial planners, lawyers & notaries, and charities who are also partners in the campaign.
- Advisor partners receive one of CAGP's best-in-class "Intro to Gift Planning" education courses.

Partner Fees

To become a Will Power partner only requires a membership with the Canadian Association of Gifts Planners (CAGP). In addition to Will Power, a CAGP membership comes with discounts on gift planning courses (many with CE credits), the MFA-P designation, and much more.

	Will Power Annual Partner Fee
Regular participation	$375 (CAGP membership)

*Limited sponsorship opportunities are available at an additional cost.
Please contact us for more details.

Some of our charity partners, and advisors from the following firms:

Assante Wealth Management; SFU Simon Fraser University; The Salvation Army; Miller Thomson Avocats | Lawyers; IG Wealth Management; WWF; The National Ballet of Canada; Greenpeace; SickKids Foundation; Ross & McBride LLP; Toronto Foundation; World Vision

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