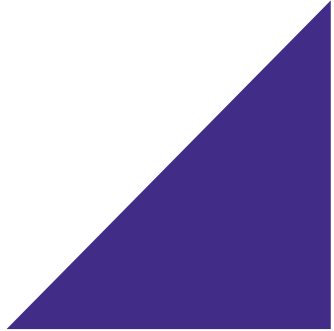
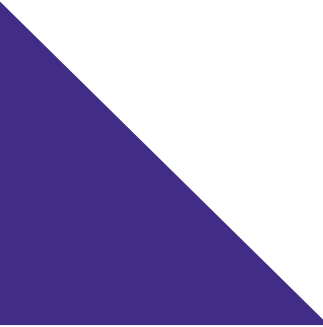




# Will Power

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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 dramatically increase funding for social good.**

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Charities are needed now more than ever. They are first to help the most vulnerable in our communities, and tackle society's most pressing issues.

Yet as demand on charities increases, funding for charities has not kept pace. Imagine Canada's Chief Economist predicts that by 2026, the charitable sector will need \$25B to meet a spiking demand for services.

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

Canadians hold an extraordinary amount of wealth in assets, much of which is passed on to the next generation through their estates. Encouraging Canadians to set aside even a small portion of their estate for the causes they care about, could result in billions more for charities to do social good.

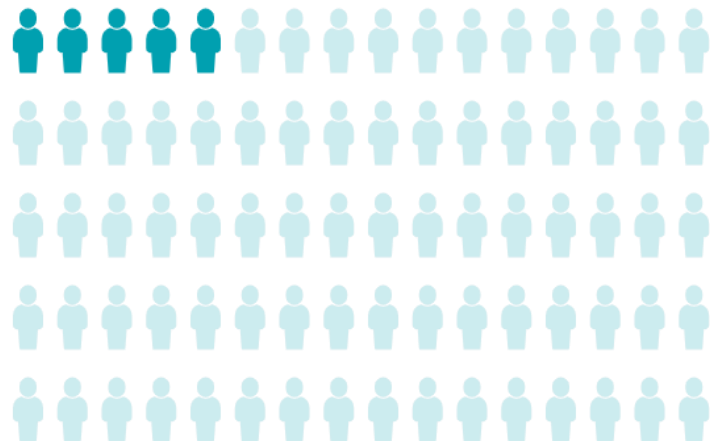
Currently, very few Canadians leave a gift in their Will to charity. We want to change that.

Will Power is a national campaign, the biggest effort in our history to make leaving a gift in a Will to charity the social norm.



# Our 10 Year Goal

Currently, only 5% of Canadians leave a gift in their Will.



By 2030, we aim to have 8.5% of Canadians leave a gift in their Will.



Generating an extra  
**\$40B for  
social  
good !**

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

Will Power is modelled on the successful [Remember a Charity](#) campaign in the UK. It took the UK campaign 10 years to reach 8.5% of their population leaving a gift in their Wills. Now, 20 years later, they are at 17%.

# How do we get there?

**ACTION**

Provide resources and tools to **drive consideration, prompt action.**

Address barriers, **increase interest.**

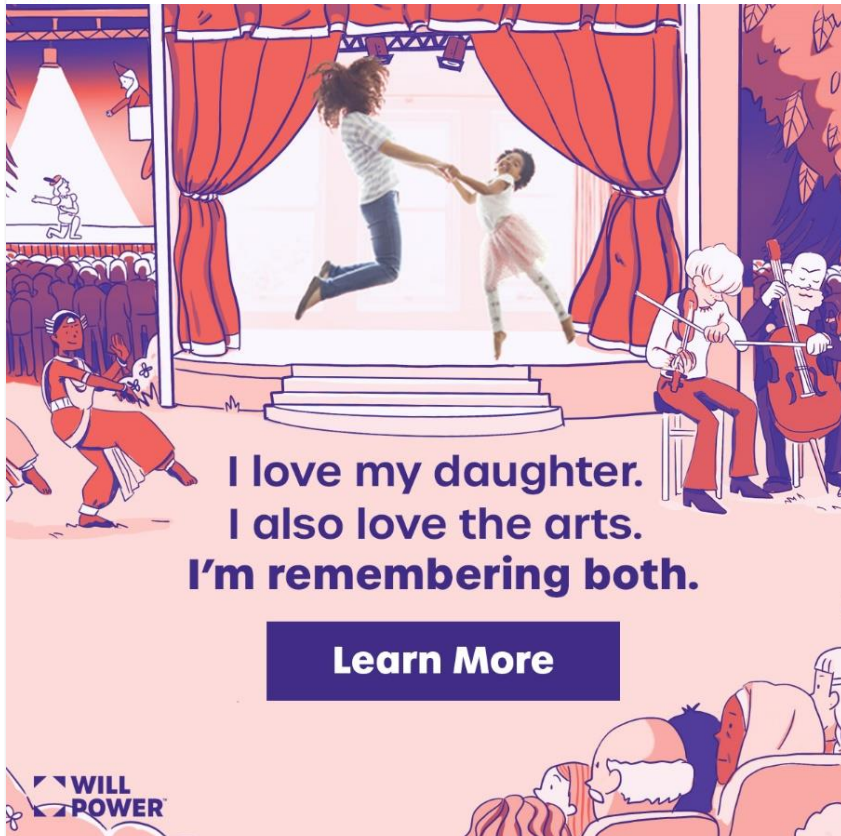
**Build awareness** for the Will Power movement.

Our 2019 [research](#) shows that the major obstacles to overcome are:

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

WillPower.ca  
31 August 2021 · 🌐

You don't have to choose between loved ones and the causes you care about. You can support both in your Will. Discover how you can change the world with a charitable gift in your Will at [willpower.ca](http://willpower.ca)



**I love my daughter.  
I also love the arts.  
I'm remembering both.**

**Learn More**

WILL POWER

WILLPOWER.CA  
Support Loved Ones and Charity in Your Will [Learn More](#)

Like Comment Share

To watch the campaign videos, [click here](#).

# Campaign Marketing

Will Power marketing builds awareness, and addresses barriers that prevent people from considering a gift in their Will.

The campaign marketing is predominantly digital, reaching our audience in all areas of the country. From September to May each year, you will find Will Power ads on:

- Facebook, Instagram, Youtube
- Banner ads
- Google search
- Newspapers in major cities across country (Sept. only)
- PR coverage in tv/radio/print publications across country (Sept. and March only)

# Sneak peak...

In the 2022/2023 campaign, we will continue to use our existing campaign marketing, and also introduce a new video to the mix.



You've always found  
room for giving back.

Keep the love going.

Support a charity in your Will



Willpower.ca

Note: This is a mock-up for illustration purposes only. Final creative with unique Will Power imagery is currently in production.

**WILL POWER** Learn & Plan ▾ Leave a Gift ▾ English ▾ GET STARTED

## Your Will is powerful

Change the world with a charitable gift in your Will, while still supporting those you love.

GET STARTED

Wills aren't just a legal way to distribute your personal assets, they can be a powerful tool for change in the world. Adding a charitable gift to your Will is easier than you think.

**HOW IT WORKS** ▾

### See how you can support your favourite causes and loved ones in your Will.

CALCULATE YOUR LEGACY

# Campaign Website

Campaign marketing drives to the Will Power website, with resources and tools that make it easy for users to explore leaving a gift in their Will and take action.

Here users can:

- Learn more about estate giving via our blog
- See how to support family and charities via the legacy calculator
- Browse charities to support
- Search for advisors to get started
- Subscribe to our emails for more tips, including invitations to estate planning events

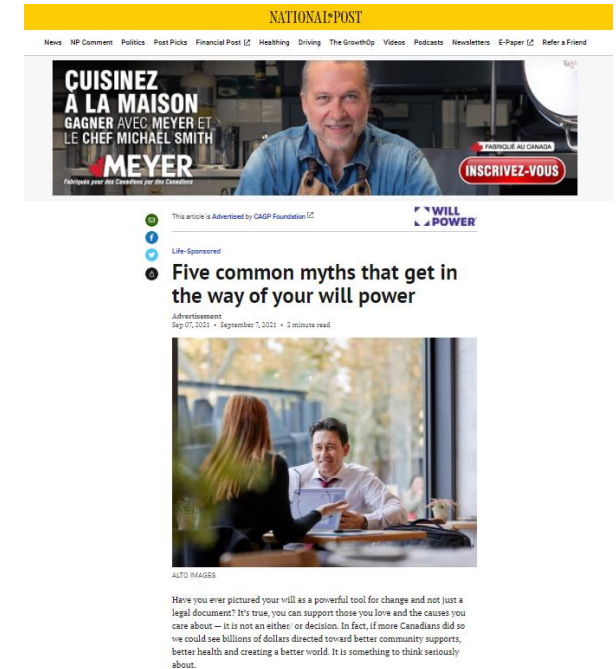
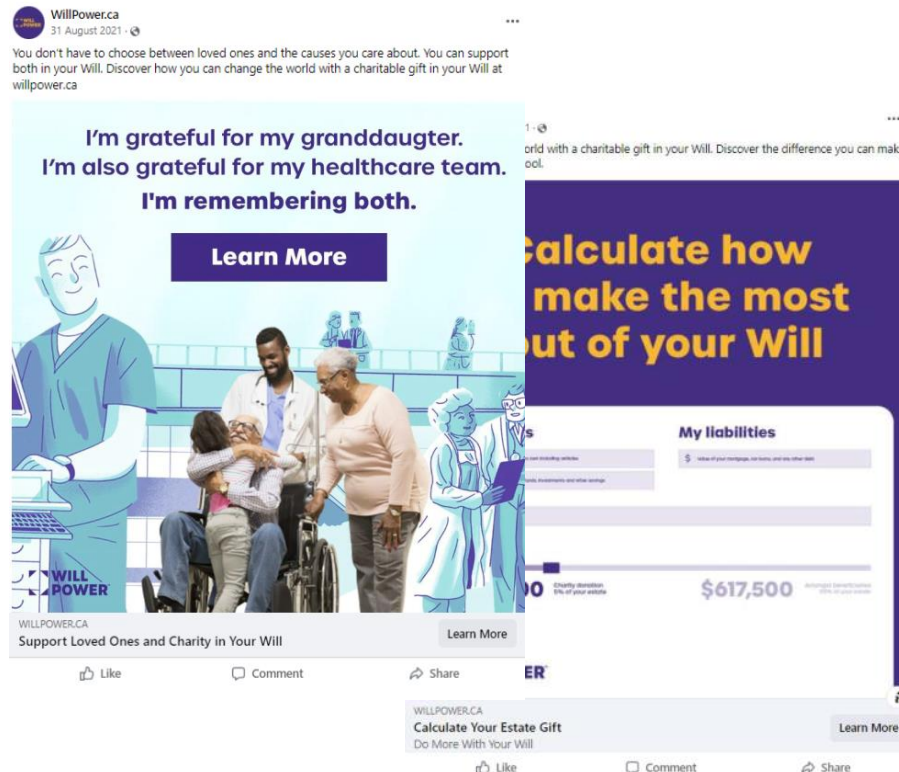
To visit the campaign website, go to [Willpower.ca](https://Willpower.ca)



# In September 2021, Will Power launched for the first time in communities across Canada. In it's first two months, the campaign was already generating some very impressive results !

- In just two months, 11% of Canadians were already aware of Will Power
- 42% of Canadians said they are more likely to leave a gift in their Will after seeing our ads
- 130,000 users on willpower.ca
- 11,571 actions on our website\*

\* Actions that show people moving towards leaving a gift in their Will, i.e. calculating their legacy, adding a charity to their list, contacting a financial/legal advisor, subscribing for more information.



**“Will Power opens the door to have deep conversations with clients - and potential clients - about their values and the good they want to do in this world.”**

 Rich Widdifield, Vincianne Tricand,  
Assante Wealth Management

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

Will Power is made up of a progressive group of charities, financial advisors, and legal professionals who are investors in the campaign, and use their voice to propel the movement forward.

Why become a Will Power partner? [Research](#) shows that few advisors engage in meaningful conversations about philanthropy with clients. Yet clients *want* in-depth advice on how to achieve their philanthropic dreams. As a Will Power partner you set yourself apart, and use your voice to help clients achieve their charitable goals.

Partners receive gift planning training, and are connected to Canadians looking for advisors to plan their estate and charitable gifts. You also receive marketing tools to leverage the campaign and open conversations with your clients about philanthropy.



## Stacy Maurier



Founding Lawyer, Estate Connection Law Firm

### About Stacy Maurier

At a time when specialization has become the way most lawyers work, Stacy Maurier is a throwback to a bygone era. With almost 25 years of experience, she is able to handle not only drafting estate documents, but can also incorporate a company, handle real estate transactions, and litigate if need be. These skills allow Stacy to take care of her clients from cradle to grave and to handle issues that arise at any point during the estate, probate, or litigation process.

While attending the University of Alberta Law School, she spent her summers working at a law firm in Grande Prairie, Alberta where she acted as an agent for the Federal Crown and prosecuted traffic court offenses. After graduating in 1999, she articulated at the firm, was called to the Bar, and was offered a partnership opportunity.

#### ESTATE CONNECTION LAW

Wanting to create a boutique law firm where she could fight for her clients while guaranteeing they were treated respectfully, Stacy founded Estate Connection – a law firm committed to helping clients succeed in the areas estate law.

### Articles by Stacy



## Helpful Tips for Updating Your Will

By Stacy Maurier

### Contact Stacy about adding a charitable donation to your will

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

SEND A NOTE

✉ hello@estateconnection.com

☎ 7804588228

➔ Stacy's website

# Your Will Power Page

Advisor partners have their own page on the campaign website, under the [Find a Financial Advisor](#) or [Find a Lawyer/Notary](#) tool. This is where users who are considering a gift in their Will can find advisors to help plan their estate and charitable gifts.

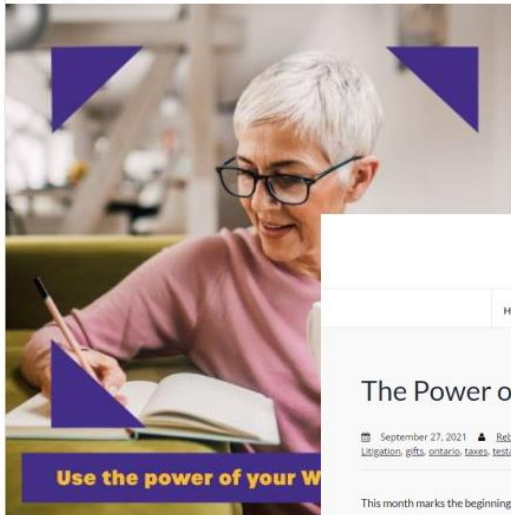
Averaging close to **17,000 visits** in just 2 months, the Find a Financial Advisor & Find a Lawyer/Notary pages have been growing in popularity as our audience moves closer to taking action on their estate plans.

Advisors who join Will Power are able to customize their own page at any time, and view the number of visits and clicks to contact.

# The Will Power Marketing Toolkit

Betty-Anne Howard MFA-P, CFP, CLU, CHS, CEA - 1st  
Philanthropic Financial Planner | Planned Giving Consultant | Financial Literacy Advocate ...

...Mother's heart - all part of her legacy wishes. Imagine how great that feels to surprise and amaze charities with these gifts! #willpowerca #yourwillispowerful



Use the power of your W

10 - 2 comments

Like Comment



HOME ABOUT OUR LAWYERS PRACTICE AREAS NEWS & EVENTS RESOURCES BLOG CONTACT

## The Power of Testamentary Charitable Giving

Print this page

September 27, 2021 | Rebecca Kennedy | Charities | Tags: canada, capacity, charitable gifts, charities, charity, Estate, Estate Litigation, gifts, ontario, taxes, testamentary, toronto, Trust, wills | 0 Comments

SEARCH

To search type and hit enter...

This month marks the beginning of the [Will Power](#) campaign, led by the CAGP Foundation and the Canadian Association of Gift Planners.

SUBSCRIBE TO OUR BLOG

Enter your email address to subscribe to this blog and receive notifications of new posts by email.

Email Address \*

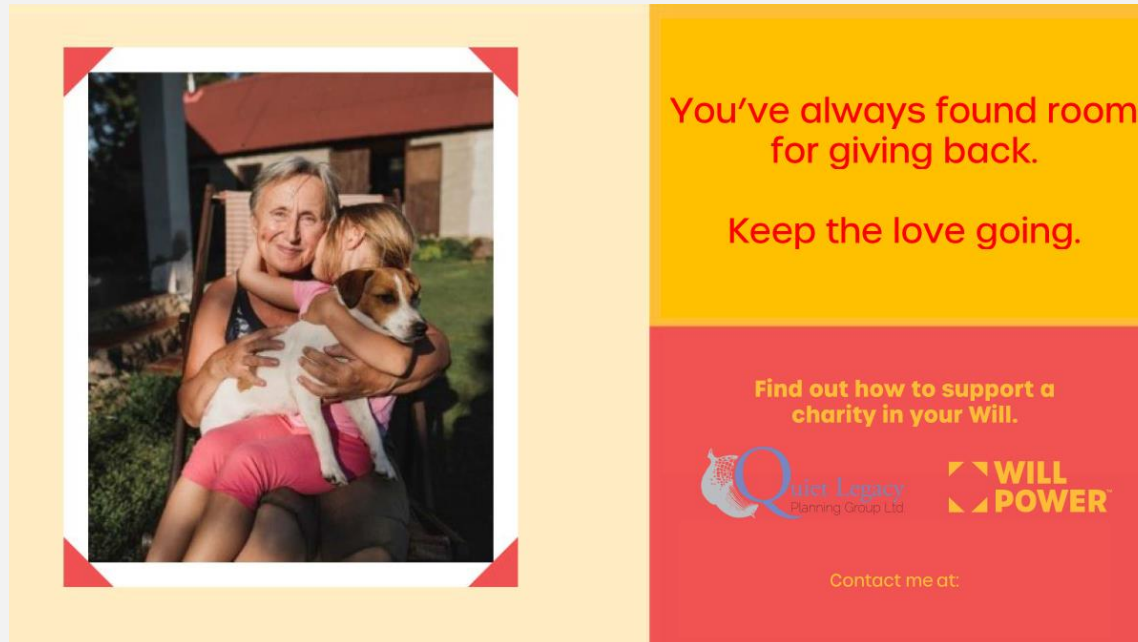
Will Power is designed to show Canadians the power they have to make a difference with their Wills by leaving charitable gifts.

Many Canadians feel that if they leave a charitable gift in their Will, it will take away from gifts and support for their loved ones, who they also wish to benefit as part of their estate plan. But according to CAGP and the CAGP Foundation, leaving even 1% of one's estate to charity can still "have an enormous impact on your cause, while still leaving 99% of your estate to your family...You don't have to choose between your loved ones and the causes you care about when planning your Will." The Will Power website has a helpful [legacy calculator](#), which can help with visualizing what it means to



# Sneak peak...

In the 2022/2023 marketing toolkit, partners will have access to existing creative and also new creative for co-branding.



Note: This is a mock-up for illustration purposes only. Final creative with unique Will Power imagery is currently in production.

Partners will also have access to a host of other new assets including:

- 2 new pre-written emails & social media posts
- 1 pre-written blog post
- Refreshed and new Will Power videos and static images for co-branding
- Suggested communications schedule
- Key messages
- Campaign branding

# Training & Networking

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Advisor partners are invited to a free “Intro to Gift Planning” course hosted by [CAGP](#), Canada’s leading educator in strategic gift planning.

Advisor partners also receive host of other benefits tied to their [CAGP membership](#) (a requirement to join the campaign):

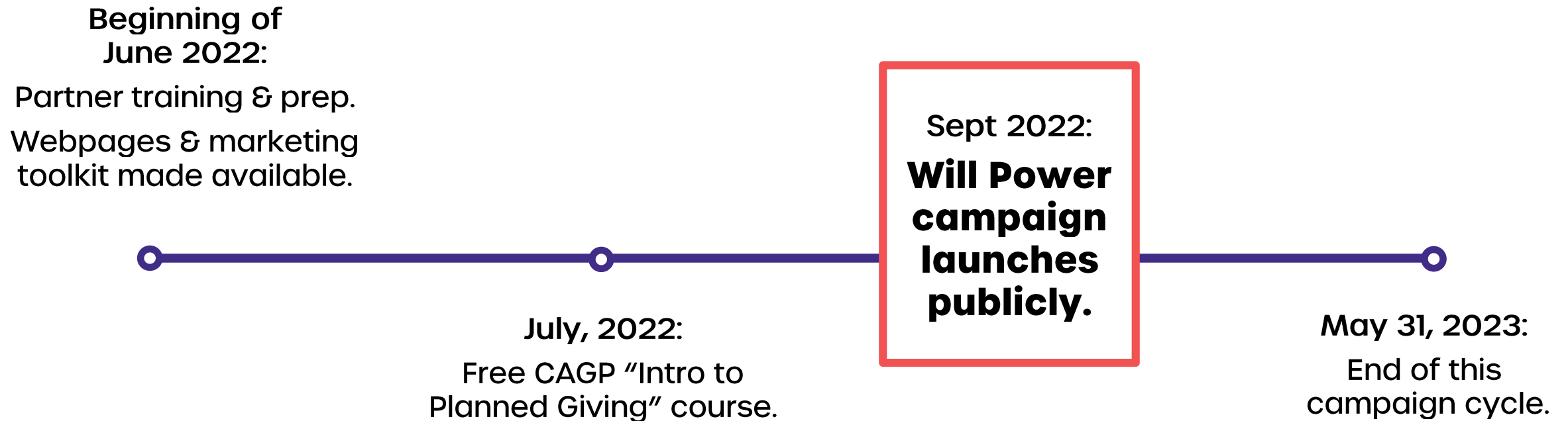
- Gift planning tools & resources
- Professional development credits for a variety of advisor associations
- Connection to a network of charity leaders and advisors peers with expertise in philanthropy



## CAGP

Canadian Association of Gift Planners

# The next Will Power Campaign launches across Canada in September 2022!



# Will Power Partnership

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To become a Will Power partner only requires that you have a membership with [CAGP](#).

In addition to Will Power, you also receive a host of other benefits tied to your [CAGP membership](#).

## Annual partner fee for advisors:

**\$375 (CAGP membership)**

Do you currently have an active CAGP membership and want to become a Will Power partner? Contact us to get started.

## Partner Benefits:

- 1** Dedicated page on the Will Power website. Putting your brand in front of an audience who looking for help planning their estate gift.
- 2** The Will Power Marketing toolkit. Includes pre-written communications, Will Power creative for co-branding, key messages, and communications schedule.
- 3** Gift planning training. Free CAGP "Intro to Gift Planning" course.





**Join our growing community of  
500 charity and advisor partners  
from across the country !**

**Register as a Will Power partner here:**  
**[www.cagp-acpdp.org/en/will-power](http://www.cagp-acpdp.org/en/will-power)**

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Questions? Contact Nancy Ho, Campaign Manager, at [nho@cagp-acpdp.org](mailto:nho@cagp-acpdp.org)

