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The Rise of Gifts in Wills: New Research and Practical Steps for Charities

SPEAKERS: LAURIE FOX & TARA SANDLER



Land Acknowledgement

Our team at CanadaHelps is grateful to have the opportunity to meet and work on many Indigenous homelands across this land we share, Canada.

As settlers on these lands, it is important to acknowledge that our Vancouver offices are located on the unceded territory of the Coast Salish People, the Montreal offices are located on Kanien'kehà:ka (Mohawk) territory, and the land on which we operate in Toronto is the traditional territory of the Wendat, the Anishinaabeg, Haudenosaunee, and the Mississaugas of the Credit First Nation.

We want to express our respect for the territories we reside in and honour the diverse Indigenous People who have lived and worked on this land historically and presently. We, the staff and leadership at CanadaHelps, are committed to being active participants in reconciliation. We are committed to continuing to amplify Indigenous voices, and learning how our work affects Indigenous People.



Source: #BeadYourProvince, Kooteen Creations

About CanadaHelps

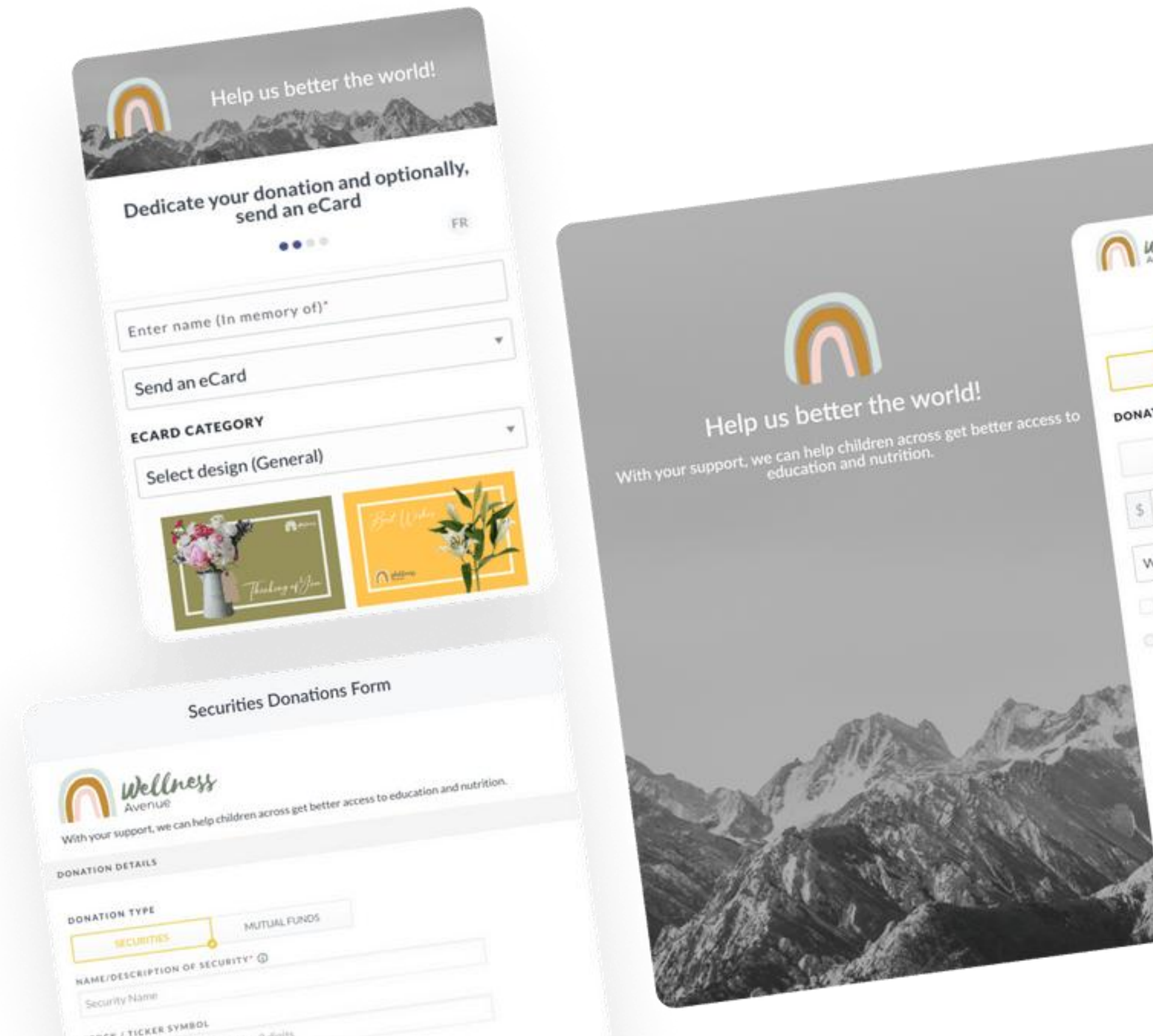
- CanadaHelps is a charitable organization increasing giving in Canada through technology.
- **For Canadians**, CanadaHelps offers the most comprehensive and flexible range of giving solutions for donating or learning about any charity in Canada.
- **For Canada's 85,000 charities**, CanadaHelps provides affordable fundraising tools and education to help charities increase their impact.
- Since 2000, more than 5 million Canadians have donated over \$4 billion to charities using CanadaHelps.



Fundraising technology that supports you and your mission

- CanadaHelps fundraising tools are purpose-built for Canadian charities
- Seamless branding and e-commerce optimization
- Automated CRA- compliant tax receipts and thank-yous
- Customizable donation forms, peer-to-peer, event tools and CanadaHelps Ensemble

Maximize your online fundraising today





Housekeeping

- The recording, slide deck and any follow-up will be emailed to you following the webinar. You'll be able to watch the **recorded video on demand**.
- Check [out our webinar archive](#)
- Have questions or technical difficulties?
- Type them into the Questions Log at anytime.

About The Presenters



Laurie Fox, MBA, Will Power Campaign Director

Laurie has been a die-hard charity sector professional for close to 2 decades. Most recently, specializing in gift planning at Toronto General & Western Hospital Foundation and Plan International Canada. For the past 6 years Laurie has been working with CAGP on the Will Power campaign, Canada's biggest effort to make leaving a gift in your Will a social norm.



Tara Sandler, VP Education & Partnerships

Since joining CAGP in 2025, Tara has been responsible for developing high-quality professional learning opportunities, strengthening relationships across the charitable and professional advisor sectors, and advancing strategic charitable gift planning across Canada.

With more than 15 years of experience in fundraising, education, partnership development, and volunteer engagement, Tara is passionate about creating meaningful learning experiences that foster collaboration, build capacity, and strengthen the philanthropic sector.

Legacy Giving in Canada

New data from the CAGP Foundation

Imagine getting a call tomorrow.

A donor has left your charity \$35,000 in their Will.



The number of Canadians who've included a charity in their Will has **doubled**.

Nearly **1 in 2** are thinking about adding a charity to their Will in the future.



Why a gift in your Will?

- An easy way to make a big impact
- Doesn't affect current finances
- Doesn't have to take away from family inheritance
- Is incredibly meaningful

How one donor changed
the future of an organization.



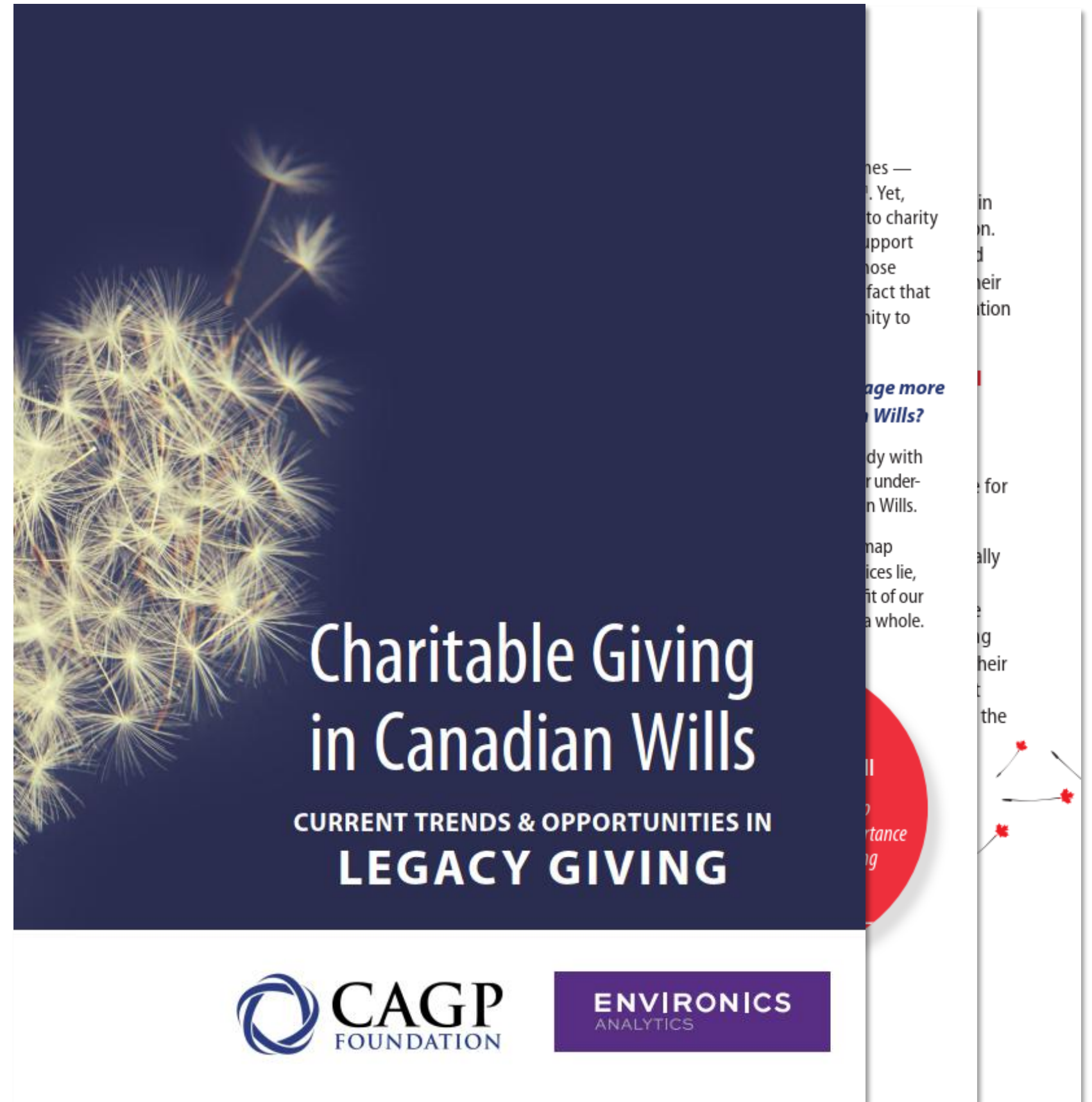
Anyone can leave a legacy

Donate to charity in your Will



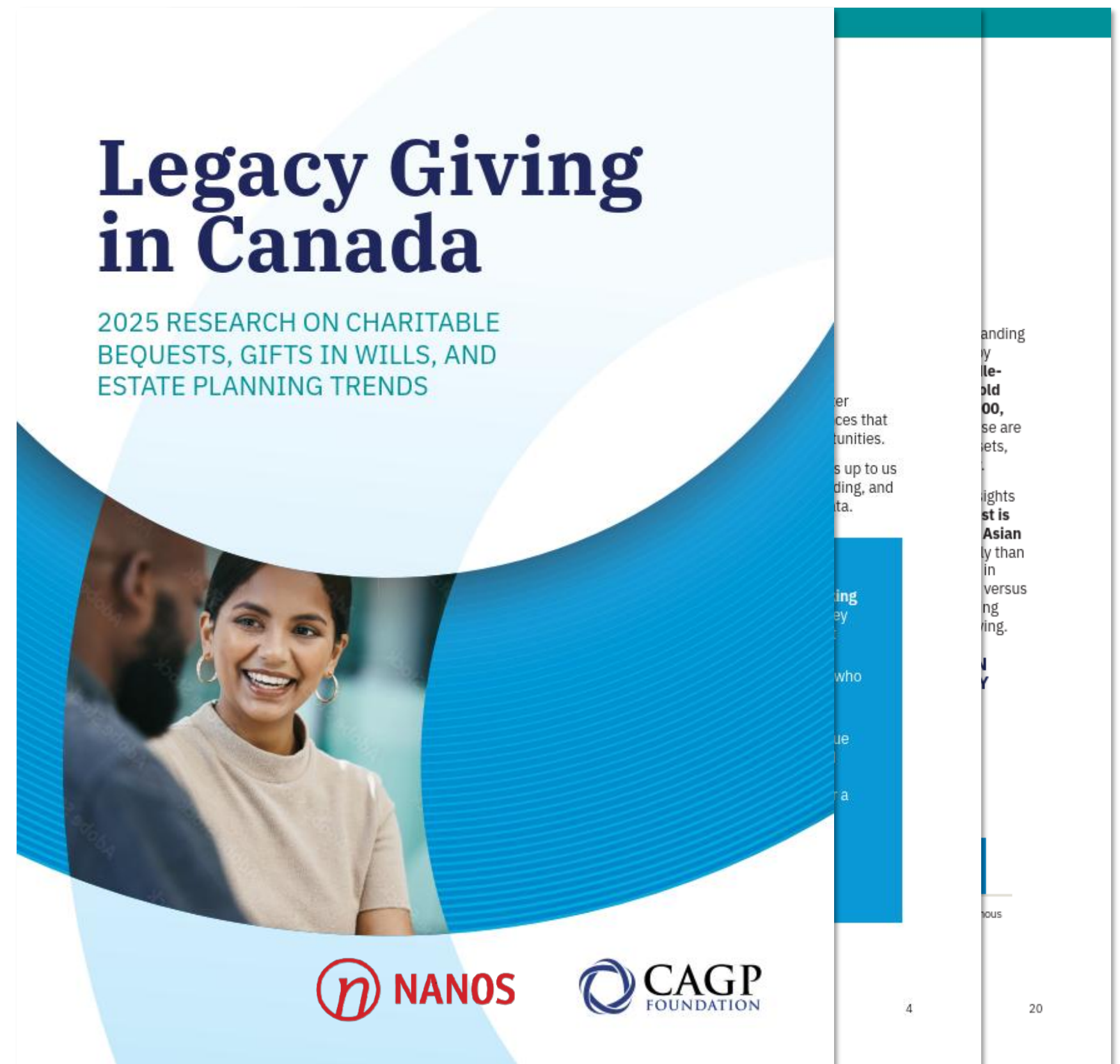
2019 Research

- 31% were interested in leaving a charitable gift in their Will
- Most interested: 35-50 & 65-75
- Biggest barrier: taking away from family
- 5% had already done it



2025 Research

- 1) Today's legacy donor
- 2) Motivations and barriers
- 3) Bring legacy giving to your charity

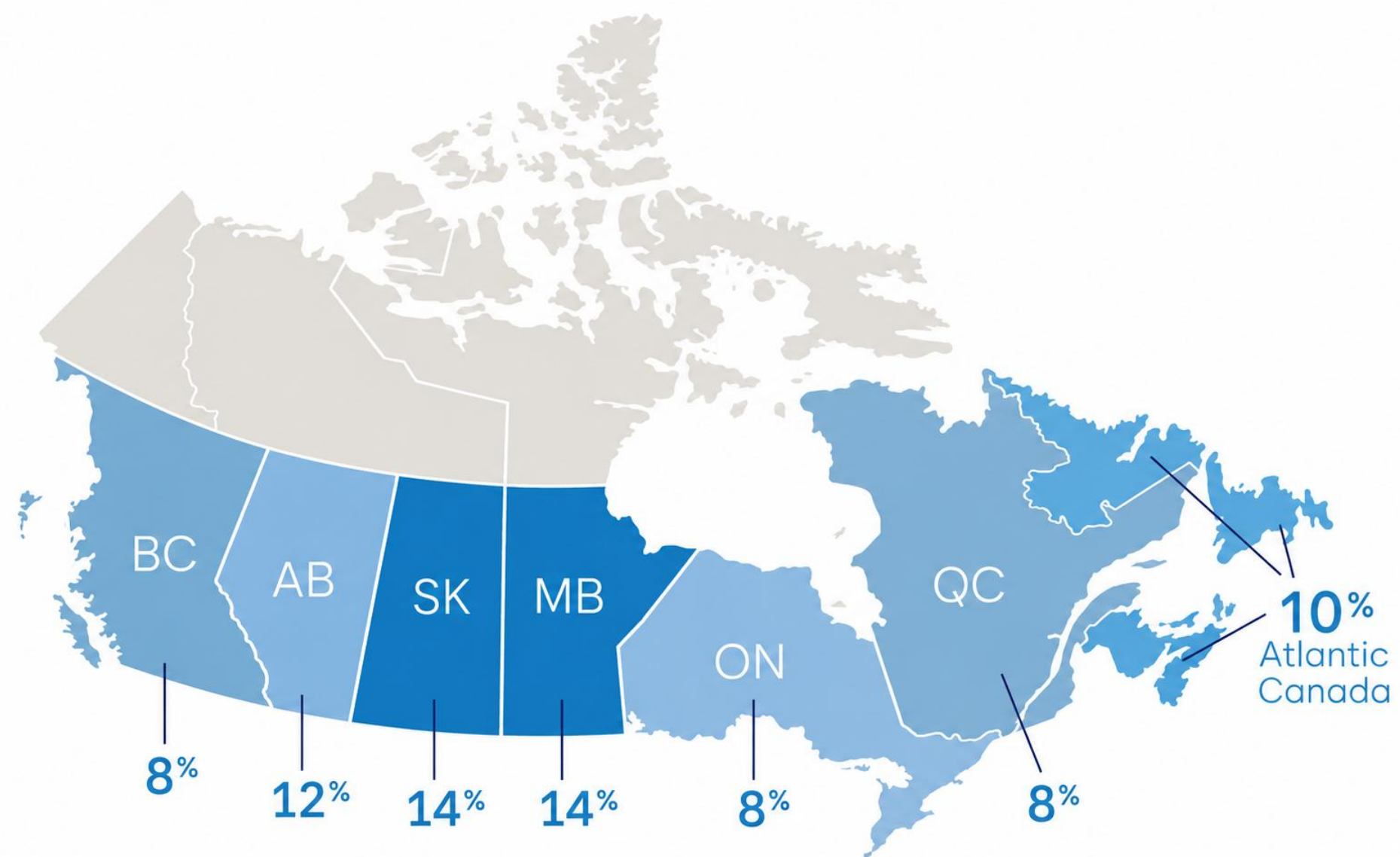


Methodology: online poll with 1200 respondents 18+, English and French, demographically representative.

Today's legacy donor



People who've already included a gift
in their Will (by province):



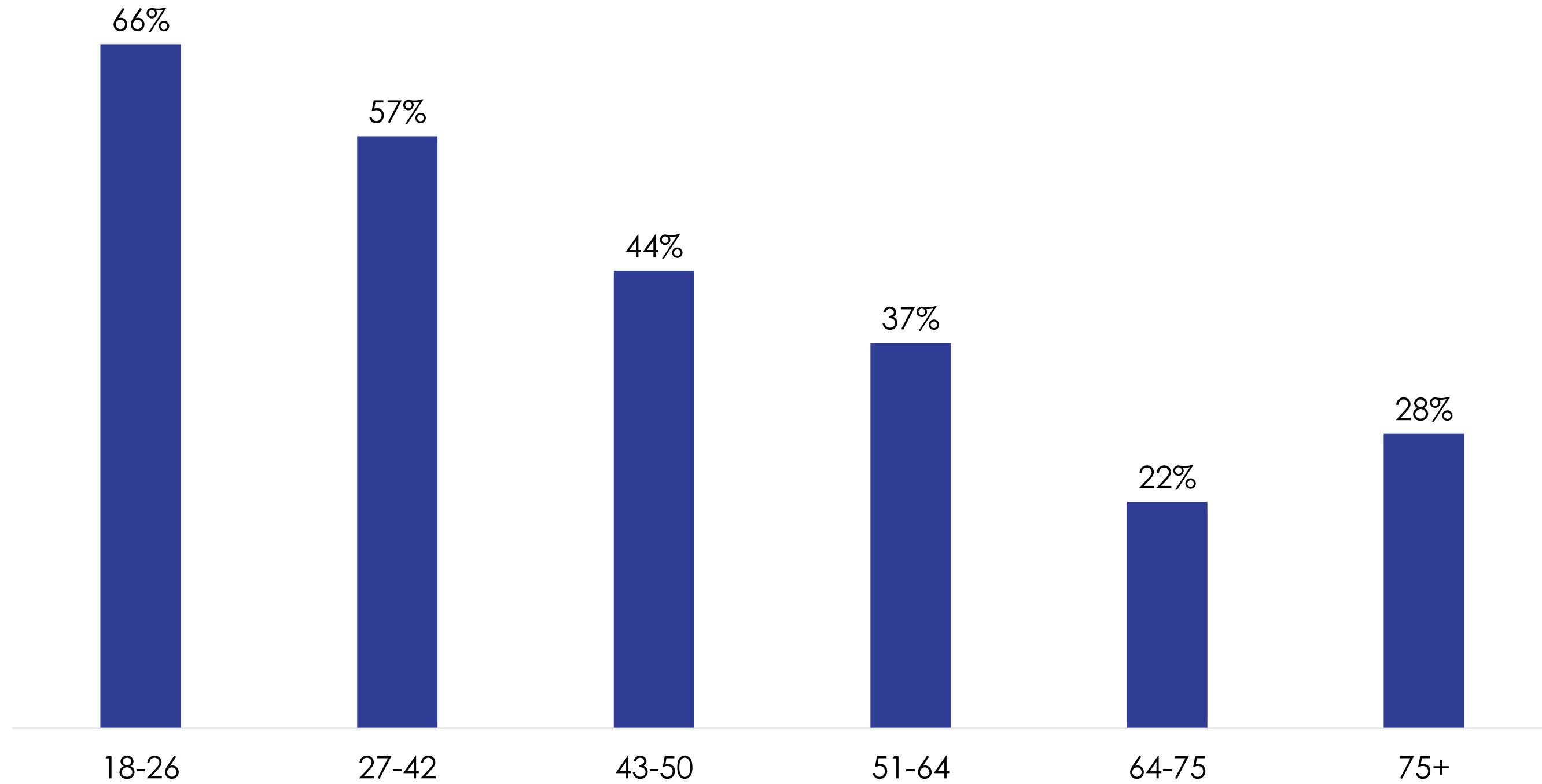
14% of Canadians 35-44
have left a gift in their Will.



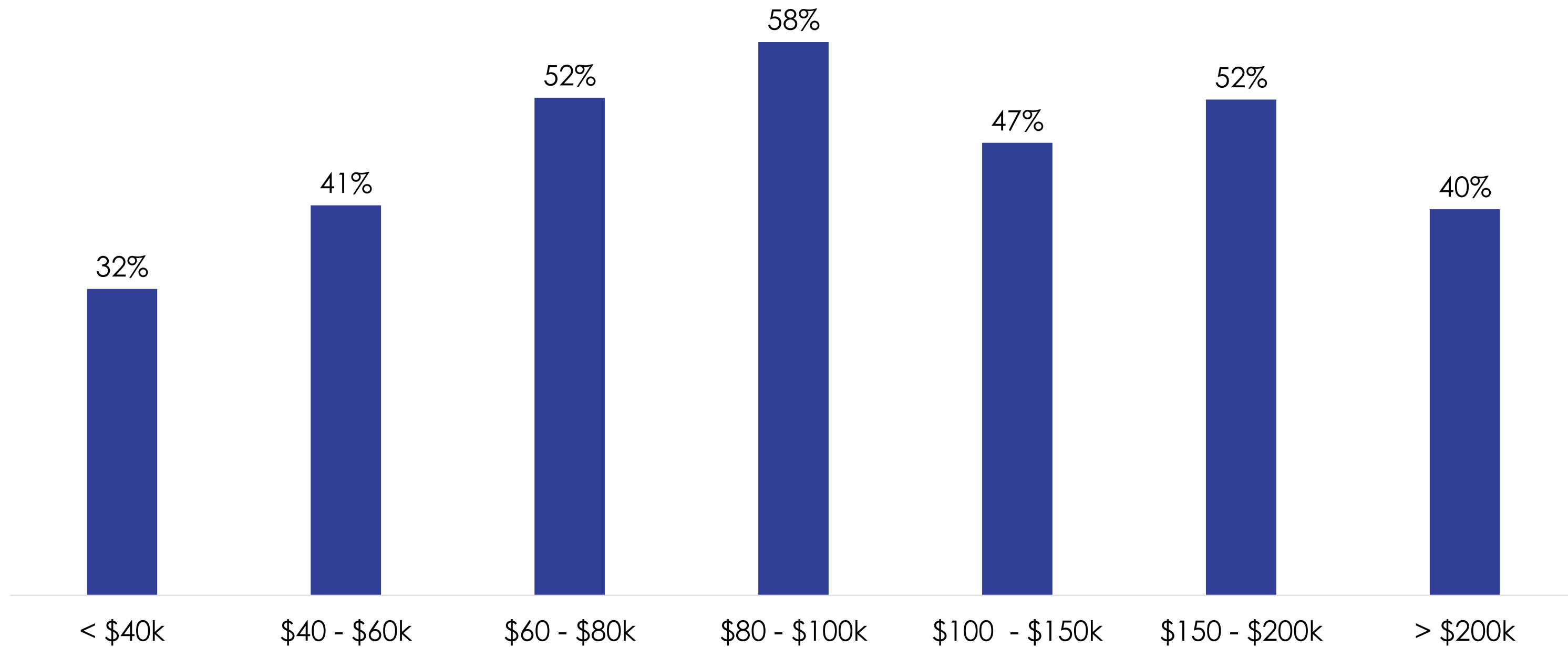
7% of Canadians 65+
have left a gift in their will.



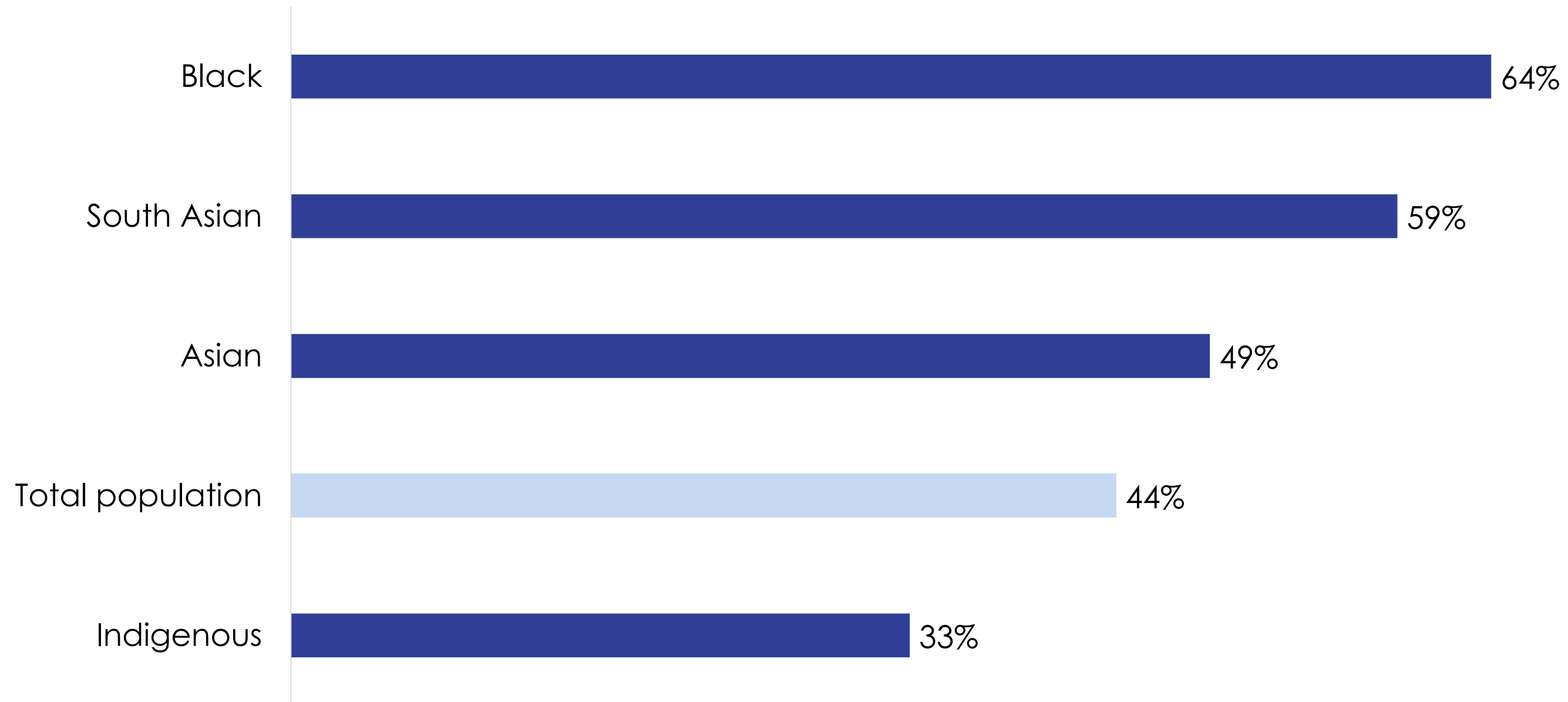
Who's most likely to leave a gift? (By age)



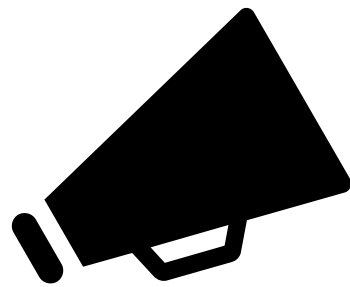
Who's most likely to leave a gift? (By household income)



Who's most likely to leave a gift? (By ethnicity)



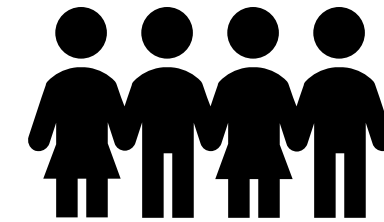
How to find future legacy donors:



Start with your biggest
champions.



Look for loyal supporters.



Broaden your audience.



About Will Donations ▾

Make a Will Donation ▾

Where to Start

English ▾



Choose a Charity >



Calculate your Gift >



Make your Will

Find a charity and get details for your Will

Charity name, number or keyword



Animals

Arts & Culture

Community Benefit

Education

Environment

Health

Indigenous-Led

International

Religion

Social Service

Sports/Recreation



**Legacy giving doesn't
replace annual giving,
it's an extension of it.**



75% say a legacy gift would not
affect their current donations.



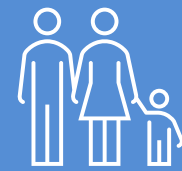
Legacy donors tend to increase
their annual gifts by 7X.

Motivations & Barriers

When it comes to your Will, what influences your decision making?



Personal values



**Family expectations
& advice**



**Religious or
spiritual beliefs**



**Community or
social norms**



Honouring ancestors



What would prevent you from leaving a gift in your Will?

- 1 I want to leave everything to loved ones.
- 2 Prefer to give in my lifetime.
- 3 Feel like I don't have much to give.

My assets

986,000

Approximate value of all property, savings, and investments.

Liabilities

My Liabilities

Approximate value of loans and other debts.

Gift to charity

\$29,580

3% of your estate



Gift to loved ones

\$956,420

97% of your estate





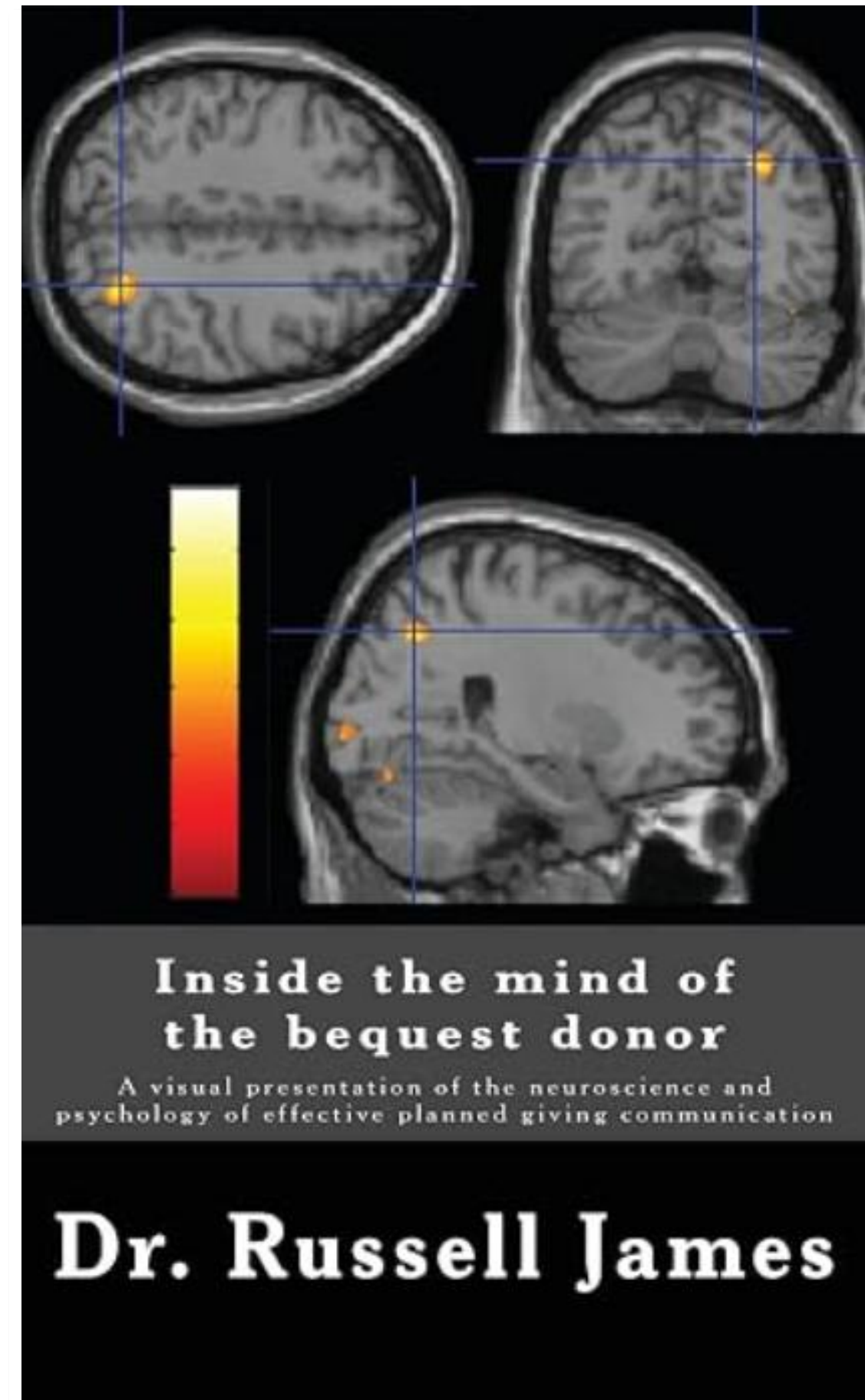
What would drive you to leave a gift in your Will?

- 1 I want to help charities I care about continue their good work.
- 2 I want to leave behind something important and long lasting.
- 3 I want to set a good example of giving back to others.

How to have the legacy conversation:

Legacy giving is tied to a donor's autobiographical centre.

More than any other type of donation, a bequest is an expression of a donor's **life story and values.**





Connect:

Tell me your story, what drew you to this cause?

Explore values:

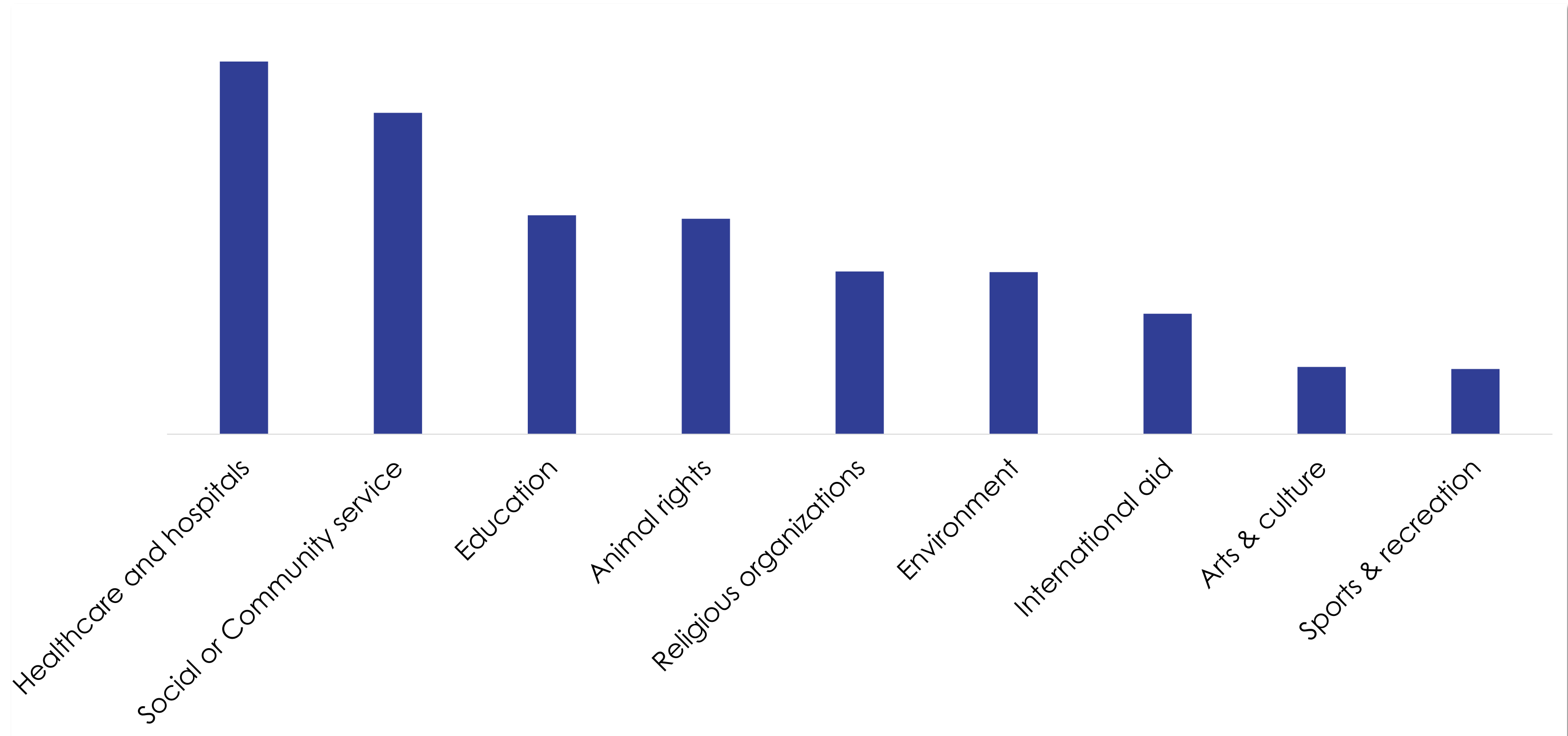
What issue do you hope to see solved in our lifetime?

Introduce legacy giving:

I was chatting with a donor the other day who told me they'd left a gift in their Will. Nothing big, they have a family to take care of, but they wanted to make sure the good work lived on.

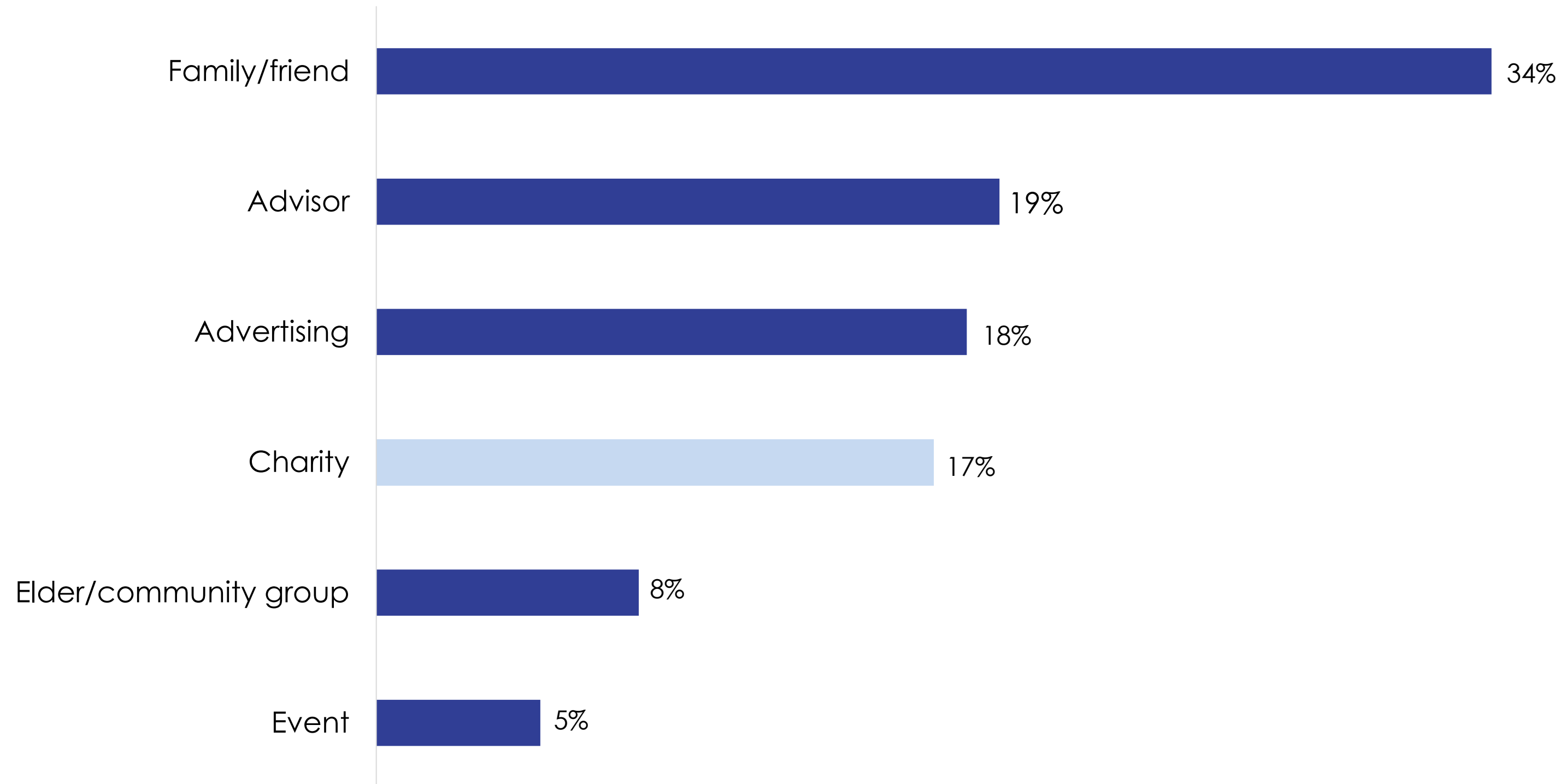
Is this something you've ever considered?

How many charities do you plan to include? 2 on average



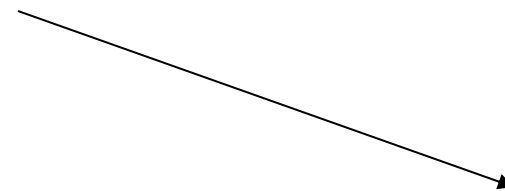
**Bring legacy giving
to your charity**

How did you learn about leaving a gift in a Will?



Legacy Marketing

It's about planting the seed with consistent, gentle reminders.



[Our Work](#)[Get Involved](#)[About Us](#)[Donate](#)



Your support changes lives

Thank you for making a difference.
Every gift matters.

1. Your gift

☐ \$50☒ \$100☐ \$250☐ \$500☐ Other

☐ Make this a monthly gift

2. Your information



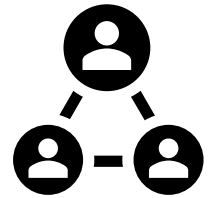
Leave a legacy of hope

A gift in your Will is a powerful way to create a brighter future for generations to come.

☐ Yes, please send me information about leaving a gift in my Will.

[🔒 Donate now](#)

Where to start with legacy marketing:



Tell your board, staff and volunteers



Add the option on your website:

- Legacy blurb
- Contact person
- Charitable registration number



Integrate into communications, i.e. story in a newsletter, P.S. on tax receipts.



Create a one-pager to have on hand

Will Power gives you a legacy program in a box:

THIS ISN'T A BILLIONAIRE'S STORY.
IT'S BETTER.



Lately, I've had more clients ask about "strategic charitable giving" – giving that allows you to make a bigger impact without affecting your financial goals. So I thought I'd share this story.

It comes from [Will Power](#) - a national initiative we're proud to support – that shows Canadians how to use their Wills, RRSPs and other financial tools for good.

It comes from Will Power, a national campaign inspiring Canadians to use their Wills to support the people and causes they love...and the one behind those portraits:



[Michael Vechikar](#) says charity wasn't really something his family talked about growing up. But he always felt an urge to be part of something big. He just didn't know where to start.

That changed when his son was born.

Like lots of new parents, he started putting together a Will. A friend gave him the idea to leave a small percentage for charity, nothing that would take away from family. It was an aha moment. "I played around with the numbers and realized that 3% in my Will could be a 5 figure gift!" he said.

This isn't a story about a wealthy philanthropist (though Michael jokes leaving a gift in his Will made him feel like Bill Gates). This is a story about someone who cared about making a difference, and found a way.

Curious what something like this would look like for you? Try the quick [legacy calculator](#) on the Will Power website. You'll see what even a small percentage — like 1, 2, or 3% — could mean for cause.

TRY THE LEGACY CALCULATOR

Wondering how a gift in your Will would be used at charity? Let's chat. No commitment, just a conversation.

Donor emails & social posts



STEP-BY-STEP GUIDE

Write your Will with family & charity in mind

1

Who are the important people in my life?

2

What kind of impact do I want to make?

3

What do I have? How will I divide it?

4

How do I put my Will together?

Legacy brochure



FINANCIAL ADVICE FOR DONORS:
7 Myths About Donating in Your Will





FREE WEBINAR

Quizzes & on-demand webinars

Will Power Schedule

Follow-along with the 2025/2026 campaign



Responsible	Activity	Channel	Timing
Will Power	Posters	Various gyms in Toronto, Montreal & Vancouver	Sept. 15 - Nov.15
Will Power	TV ads	All Bell Media ConnectedTV	Sept. 8-Nov. 15
Will Power	Podcast ads	Various	Sept. 8-Nov. 15
Will Power	Digital advertising (awareness campaign) Digital advertising (conversion campaign)	Banner displays, YouTube, Facebook, Instagram, Google	Sept. 8-Nov. 15
Partners	Communication #1 with PR activation	Email, socials	Mid./end of Sept.
Partners	Communication #2	Email, socials	Early/mid. Oct.
Will Power	Globe & Mail	Banner displays	Sept. 8-Nov. 30
Will Power	Globe & Mail 1/2 page ad in Estate Planning feature	Print & digital	Sept. 30
Will Power	La Presse	Banner displays	Oct.-Nov.
Will Power	La Presse sponsored article	Digital	Sept. 15-Oct.
Will Power	La Presse 1/2 page ad in Philanthropy Special	Digital	Nov. 13

If you need help, just reach out!

Nancy Ho, Campaign Manager, nho@cagp-acpdp.org

A plug-n-play strategy

Passive vs. Active program



LEARN ABOUT WILL POWER



Book a Time with CanadaHelps' Team to
discuss your fundraising



charitylife@canadahelps.org