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St. Joseph's Healthcare Hamilton FOUNDATION

HOPE HEALING DISCOVERY

ADVISOR ASSETS

ON PHILANTHROPY & ESTATE PLANNING

Discussing Charitable Giving with your Clients

A growing number of Canadians are leaving gifts to charities in their Wills, so chances are that many of your clients may be interested in learning how they can include a cause close to their hearts in their Will or estate plans.

They may be searching for ways to leave a legacy after their passing, to give back to their community, to honour a loved one, or simply to do some good.

As a professional advisor, whether you're a lawyer, financial planner, tax advisor or insurance agent, you have a unique opportunity to discuss philanthropy (or strategic giving, as it's sometimes called) with your clients.

One of the simplest and most important ways you can do this is by engaging your clients in a discussion about their estate plans and the people, organizations and causes that mean the most to them.

Questions to engage your clients in the topic of charitable giving:

- How would you like to be remembered?
- Are there any charities/causes that have impacted you or your family in your lifetime?
- Have you considered including charity in your Will, in addition to family?
- What would you like a gift in your Will to accomplish to help future generations?

Any Questions? Reach out! Our Foundation team is here to help.

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- Ask us about the Hospital's greatest funding needs
- Learn why donations are essential to Hospitals
- Share how St. Joe's can recognize donations too!