Checklist – "Thinking About a Green Legacy? Start Here."

The following is a simple, practical tool for anyone thinking about estate planning with environmental impact in mind.

Thinking About a Green Legacy? Start Here.

Here's a helpful checklist to guide your conversations with family, your lawyer, or your financial advisor as you explore options for planned giving.

Step-by-Step: How to Start

1. **Reflect on Your Values**
    - What causes have mattered most to you in life?
    - How do you want to be remembered?
2. **Take Inventory**
    - Do you have a will or estate plan in place?
    - What assets might you consider giving (money, property, investments, life insurance)?
3. **Talk to a Professional**
    - Meet with a lawyer or financial advisor who understands charitable giving and can guide you through tax-smart options.
4. **Explore Your Giving Options**
    - Ask about:
        - Bequests in a will
        - Donating securities
        - Naming a charity as a beneficiary of RRSPs, RRIFs, or TFSAs

        - Donating life insurance
        - Creating an endowment
        - Setting up a charitable remainder trust

5. **Choose Your Charity**
    - Identify a local or national organization that aligns with your values.
    - Make sure they can accept the type of gift you're considering.
6. **Update Your Will or Beneficiary Forms**
    - Work with your advisor to put your plan in writing.
    - Keep your documents safe and let your family or executor know your wishes.

A Few Questions to Ask Your Advisor

- What's the most tax-effective way to include a charity in my will?
- Can I donate part of my RRSP or TFSA?
- How does a gift of securities compare to cash?
- What are the benefits of setting up an endowment?
- Is there a way to make a gift while still providing for my family?