



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?