Succession Plan



A Succession Plan outlines your charitable wishes and indicates how you would like your accounts to be administered in the event of your passing or incapacitation.

Charitable Impact should be notified and provided with proof of the account holder's death in order to carry out the recommendations outlined in the Succession Plan.

01. Fund information

To be completed by Charitable Impact

Impact Account number	Charitable Investment Account number	Advisor name	Brokerage name

02. Account holders

If there are two account holders, the Succession Plan will be initiated once both account holders have passed or are incapacitated.

Account holder #1					
Title	First name	Last name	Preferred Name	Pronouns	
Phone nur	nber	Email address	Preferred method of contact		
Address		City	Province	Postal code	
Account holder #2					
Title	First name	Last name	Preferred Name	Pronouns	
Relationsh	ip to Account holder #2	Phone number	Email address	Preferred method of contact	
Same address as Account holder #1					
Address		City	Province	Postal code	

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03. Choose a successor option

Select one of the following options.

Option 1

Recommend an account successor

A successor will assume all account privileges and make recommendations on the account in the event of your passing or incapacitation. A successor might be a spouse, child, assistant, or trusted advisor. If you list more than one successor, they are appointed jointly.

Option 2a

Make a recommendation to grant charitable assets immediately

Assets in the Charitable Investment Account will be liquidated and transferred to your Impact Account where the charitable dollars will be distributed to the recipients you specify immediately. Grants must be made to a Canadian registered charity, Giving Group, Campaign, or another Impact Account.

Option 2b

Make a recommendation to grant charitable assets over time

Assets in the Charitable Investment Account will be liquidated and transferred to your Impact Account where the charitable dollars will be distributed to the recipients you specify over time. A specific dollar amount or percentage can be granted annually until the fund runs out, or the account's annual growth can be granted each year so the fund exists indefinitely.

Option 3

Create a custom plan

If none of the previous options align with your wishes, describe your custom plan below.

Option 1: Recommend an account successor

First name		Last name		Pronouns
	Email address		Relationship to Account holder #1	Relationship to Account holder #2
Name used to recommend grants			Note to successor	
First name		Last name		Pronouns
	Email address		Relationship to Account holder #1	Relationship to Account holder #2
mmend grants			Note to successor	
}				
		Last name		Pronouns
	Email address		Relationship to Account holder #1	Relationship to Account holder #2
Name used to recommend grants		Note to successor		
	mmend grants Pirst name mmend grants First name	First name Email address The street of the	Email address Email address	Email address Email address Relationship to Account holder #1 Note to successor First name Email address Relationship to Account holder #1 Note to successor Email address Relationship to Account holder #1 Note to successor Relationship to Account holder #1 Email address Relationship to Account holder #1

Options 2a & 2b: Make a recommendation to grant charitable assets immediately or over time

If you selected 2a or 2b, specify up to four charitable recipients.

Name	ID*	% of amount (total should be 100%)	Note to share with recipient	
Recipient #1				
Recipient #2				
Recipient #3				
Recipient #4				
Note about ID: For charities, provide the charity's registration number. For Giving Groups, provide the name of the group and its administrator. For Impact Accounts, provide the individual's name and email.				

If a recipient listed above is unable to accept gifts at the time of your passing or incapacitation, the assets can be redistributed to the remaining recipients listed. Or, Charitable Impact can give the funds to an organization undertaking similar work.

Please select your preference (required):

Redistribute the assets to the remaining recipients

Give the funds to an organization undertaking similar work

Additional comments

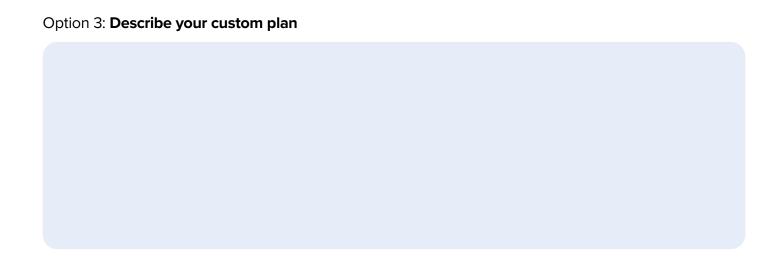
Option 2b: Make a recommendation to grant charitable assets over time

If you selected 2b, select how you would like your charitable assets distributed.

Send \$ to charitable recipients annually until the fund runs out.

% of the Charitable Investment Account balance to charitable recipients annually until the fund runs out.

Send annual Charitable Investment Account growth to charitable recipients each year so the fund exists indefinitely.



04. Acknowledgement and signatures

Account holder #1		Account holder #2	
Account holder name	Date	Account holder name	Date
Signature		Signature	

05. Next steps

If you haven't done so already, please complete the following:

- If applicable, connect with your recommended account successor and share your Succession Plan with them.
- Connect with your financial advisor to make a donation.
- · Connect with Philanthropic Advisory Services to recommend a gift to charity and/or discuss your charitable giving goals.

Please note that you can update your wishes anytime by completing a new Succession Plan.

Philanthropic Advisory Services

+1 877 531 0580

philanthropy@charitableimpact.com