

Succession Plan



CHARITABLE IMPACT

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 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

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 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Phone number | Email address | Preferred method of contact | | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | | |
| Address | City | Province | Postal code | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |

Account holder #2

| | | | | |
|-----------------------------------|----------------------|----------------------|-----------------------------|----------------------|
| Title | First name | Last name | Preferred Name | Pronouns |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Relationship to Account holder #2 | Phone number | Email address | Preferred method of contact | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Same address as Account holder #1 | | | | |
| Address | City | Province | Postal code | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |



03. Choose a successor option

Select one of the following options.

| | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><input type="radio"/> Option 1</p> <p>Recommend an account successor</p> <p>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.</p> | <p><input type="radio"/> Option 2a</p> <p>Make a recommendation to grant charitable assets immediately</p> <p>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.</p> | <p><input type="radio"/> Option 2b</p> <p>Make a recommendation to grant charitable assets over time</p> <p>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.</p> | <p><input type="radio"/> Option 3</p> <p>Create a custom plan</p> <p>If none of the previous options align with your wishes, describe your custom plan below.</p> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Option 1: Recommend an account successor

Successor #1

| | | | | |
|-------------------------------|----------------------|-----------------------------------|-----------------------------------|--|
| Title | First name | Last name | Pronouns | |
| <input type="text"/> | | | <input type="text"/> | |
| Phone number | Email address | Relationship to Account holder #1 | Relationship to Account holder #2 | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Name used to recommend grants | Note to successor | | | |
| <input type="text"/> | <input type="text"/> | | | |

Successor #2

| | | | | |
|-------------------------------|----------------------|-----------------------------------|-----------------------------------|--|
| Title | First name | Last name | Pronouns | |
| <input type="text"/> | | | <input type="text"/> | |
| Phone number | Email address | Relationship to Account holder #1 | Relationship to Account holder #2 | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Name used to recommend grants | Note to successor | | | |
| <input type="text"/> | <input type="text"/> | | | |

Successor #3

| | | | | |
|-------------------------------|----------------------|-----------------------------------|-----------------------------------|--|
| Title | First name | Last name | Pronouns | |
| <input type="text"/> | | | <input type="text"/> | |
| Phone number | Email address | Relationship to Account holder #1 | Relationship to Account holder #2 | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Name used to recommend grants | Note to successor | | | |
| <input type="text"/> | <input type="text"/> | | | |

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.

Send _____ % 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.

Option 3: Describe your custom plan

04. Acknowledgement and signatures

Account holder #1

Account holder name

Date

Signature

Account holder #2

Account holder name

Date

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