

2024 NATIONAL INTEGRATED SPECIAL REPORT – DIGITAL AND NEWSPAPER

Estate Planning and Legacy Giving

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Contrary to the misconception that estate planning is solely for the ultra-wealthy, it benefits everyone, regardless of net worth, marital status, or age. This feature highlights the importance of estate planning, covering key elements and practical advice to make it accessible for individuals at any life stage, providing confidence and foresight in navigating the unexpected.

Proposed topic highlights:

PHILANTHROPIC PLANNING — Exploring the impact of leaving a legacy gift.

EXPERT ADVICE — Seeking trusted guidance in navigating the estate planning process.

WILLS, TRUSTS & INHERITANCES — Delving into how Canadians are choosing the best methods of asset allocation for their needs.

LIFE INSURANCE — Utilizing life insurance as an estate-planning tool. **TECHNOLOGY** — Examining how new software tools make estate planning easier than ever before.

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Source: Vividata SCC Fall 2023, National, Adults 18+