

2026

The Legacy Landscape: Understanding Planned Giving in Canada

Gifts in Wills from Lawyers' Offices to Online Platforms

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Hi bonjour! 🖐️🖐️🖐️🖐️🖐️



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Partner at Good Works



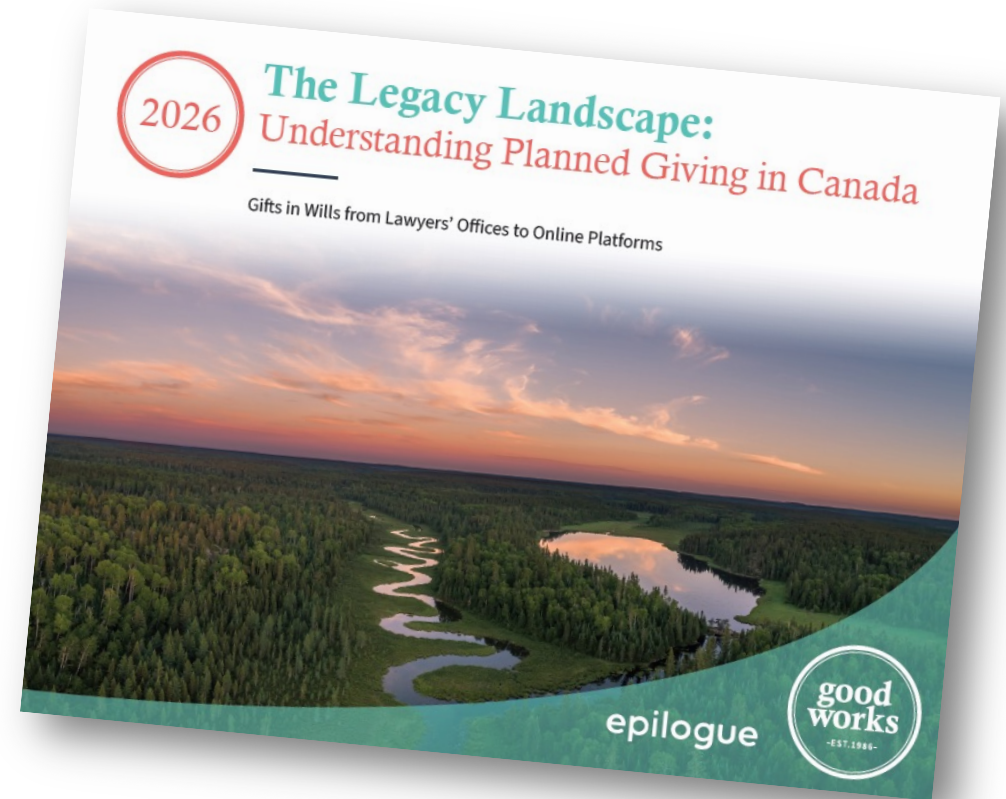
Arin Klug (he/him)
Co-Founder, Epilogue

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Your Next 60 Minutes

- Methodology & Data
- Will-making in Canada
- Will-making Vehicles
- Bequesting in Canada
- Unpacking Online Bequesting
- Modelling The Market
- Conclusions & Takeaways



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The Legacy Landscape TLDR



Canadians are making charitable bequests today at the same rate they were 15 years ago.



1.3M Canadians have left \$180B to charities in their Wills, with another 1.1M gearing up to leave another \$156B.



Your best legacy prospects are making more Wills.

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The Legacy Landscape TLDR



Online platforms are on the rise, with 11% of reported Wills having been made using them.



Online Will-makers include bequests nearly 4x as frequently when guided to their Will-making by a charity.



Online and traditional Will-makers behave similarly.

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Welcome to The Legacy Landscape

(the report formerly known as The State of the Legacy Nation)

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The State of the Legacy Nation

- Research first done alongside Iceberg Philanthropy and published in 2007
- Repeated about every 3 years (ish)
- Consistent questions allow for multi-year comparison



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When we set out to create Legacy Nation 2026, we brought our friends at **Epilogue Wills** to the table

We realized pretty quickly that this report would be **incredibly different** from the Legacy Nation of the past

New data, **new** questions, **new** report... the Legacy Landscape began to take form!

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Survey Data

- Designed by Good Works
- Fielded by Environics Research
- Survey of 1,500 English-speakers in Canada (outside Quebec)
- October 10, 2025 through October 22, 2025

Online Will Data

- Analyzed data from Epilogue's online Will platform
- Completed Wills between January 2024 and December 2025

One new question this year: we asked Will-makers what vehicle they used to make that Will.

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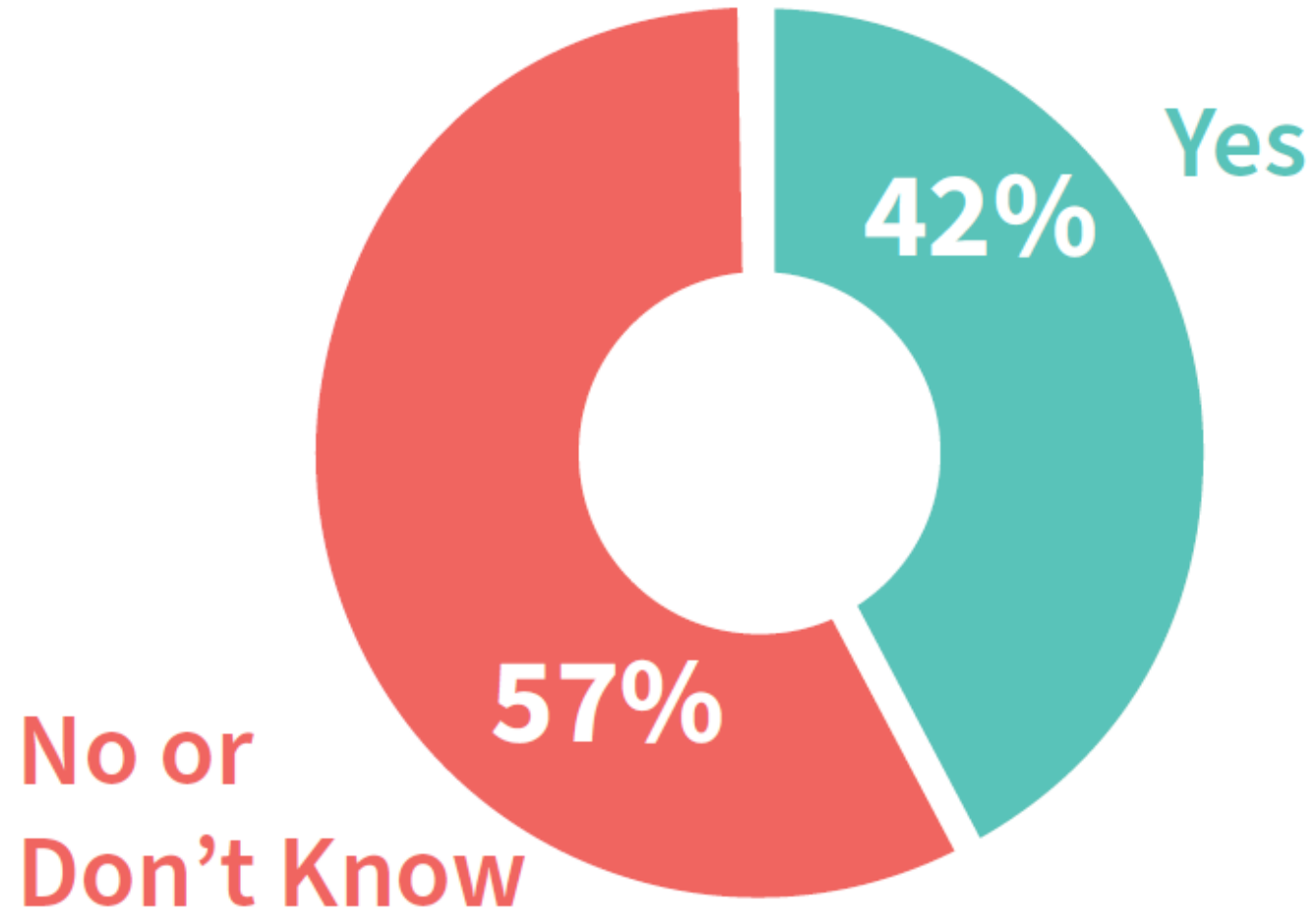
Will-making In Canada

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SURVEY:

Do you have a Will?

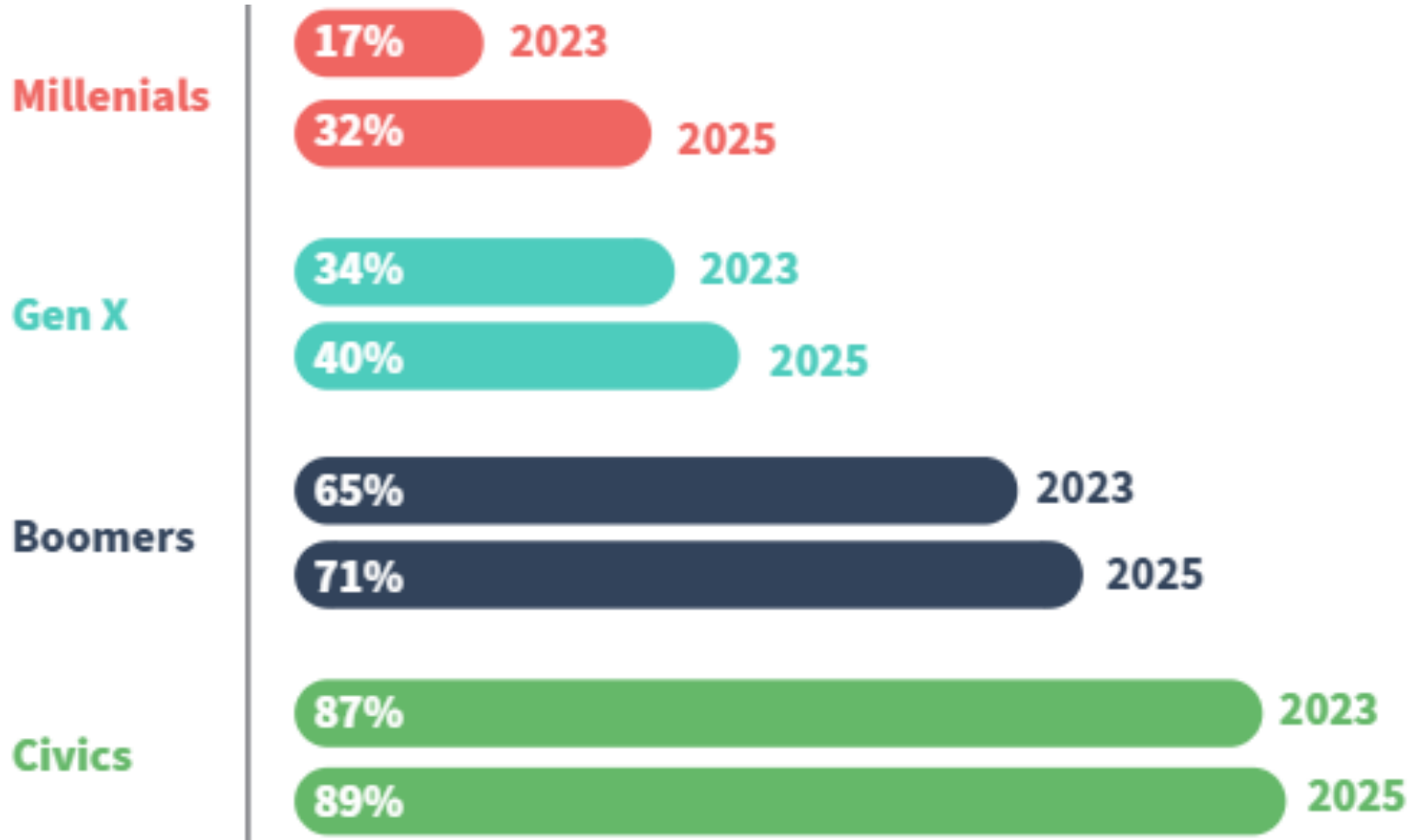


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SURVEY:

Will-making by Generational Cohort Over Time

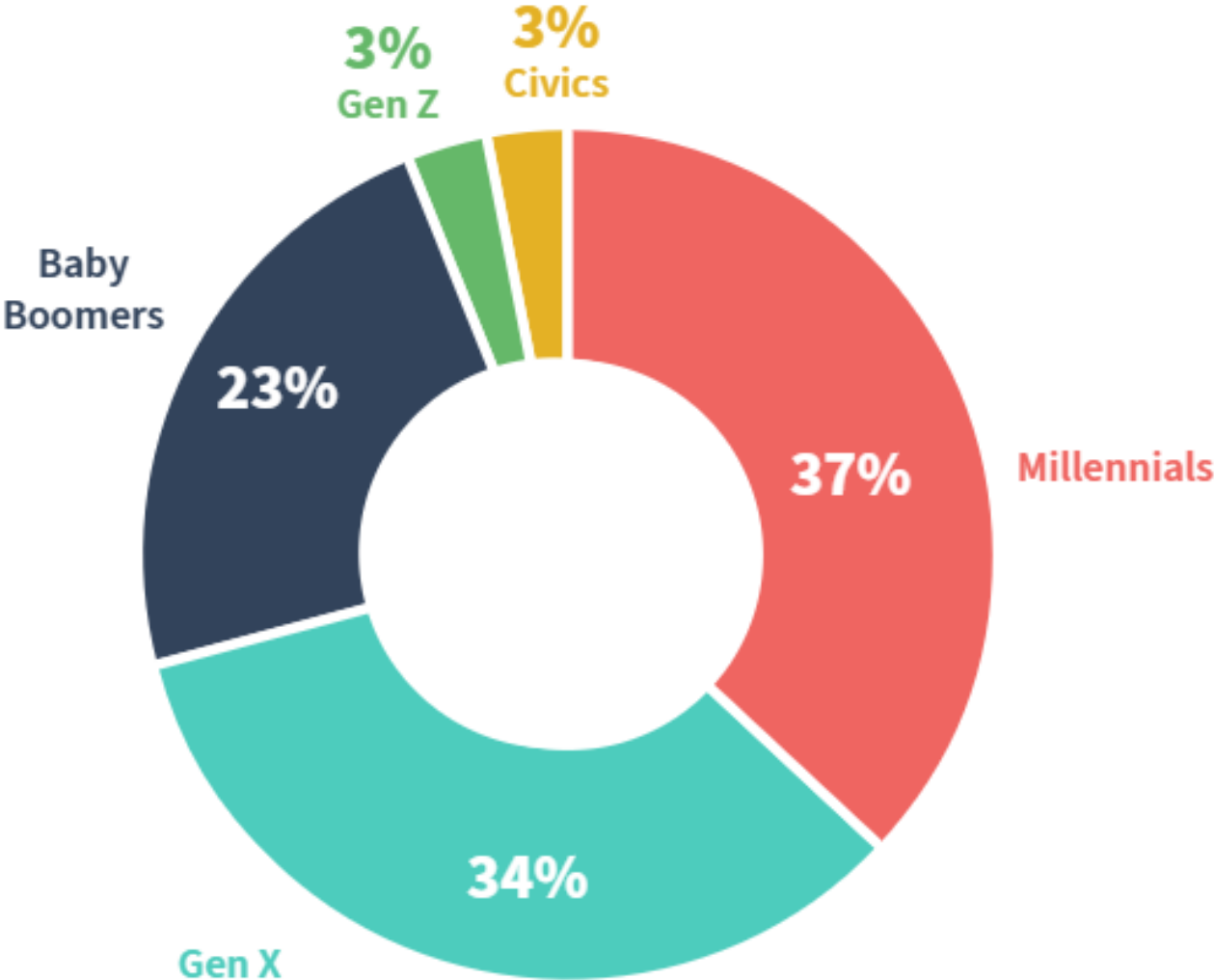


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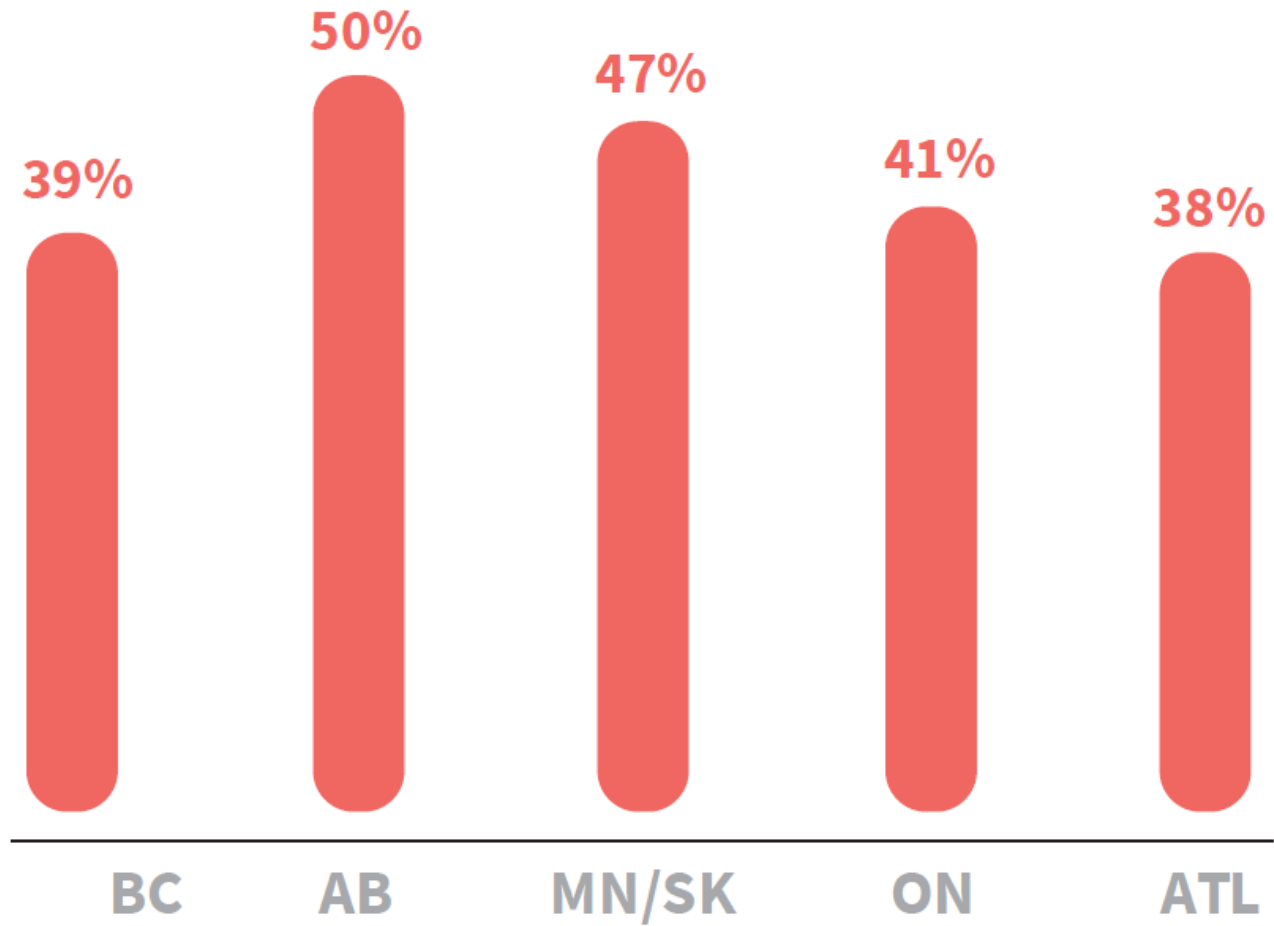
ONLINE:

Will-making by Generational Cohort



SURVEY:

Will-making by Province



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Will-making by Gender

SURVEY:

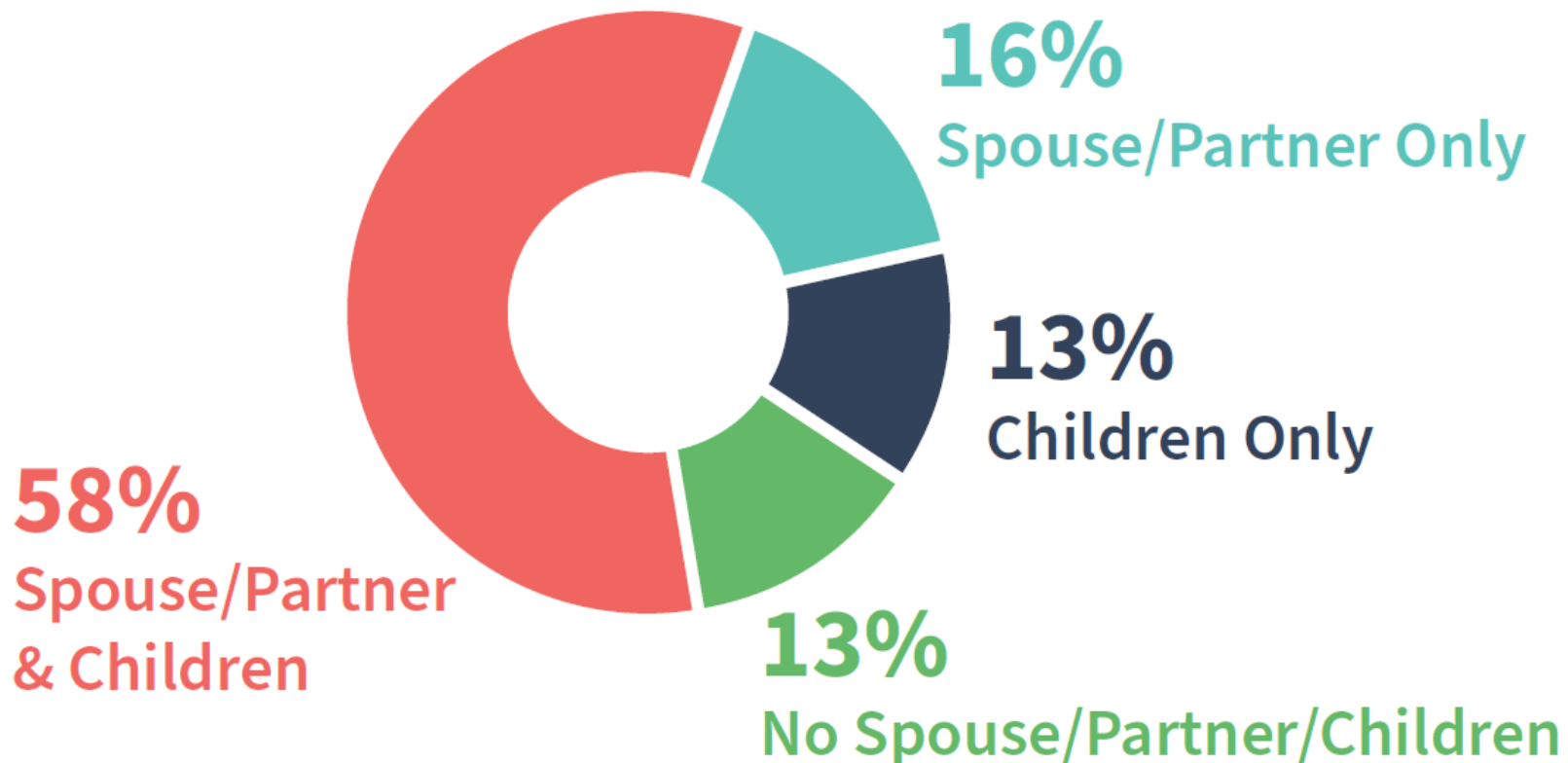


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ONLINE:

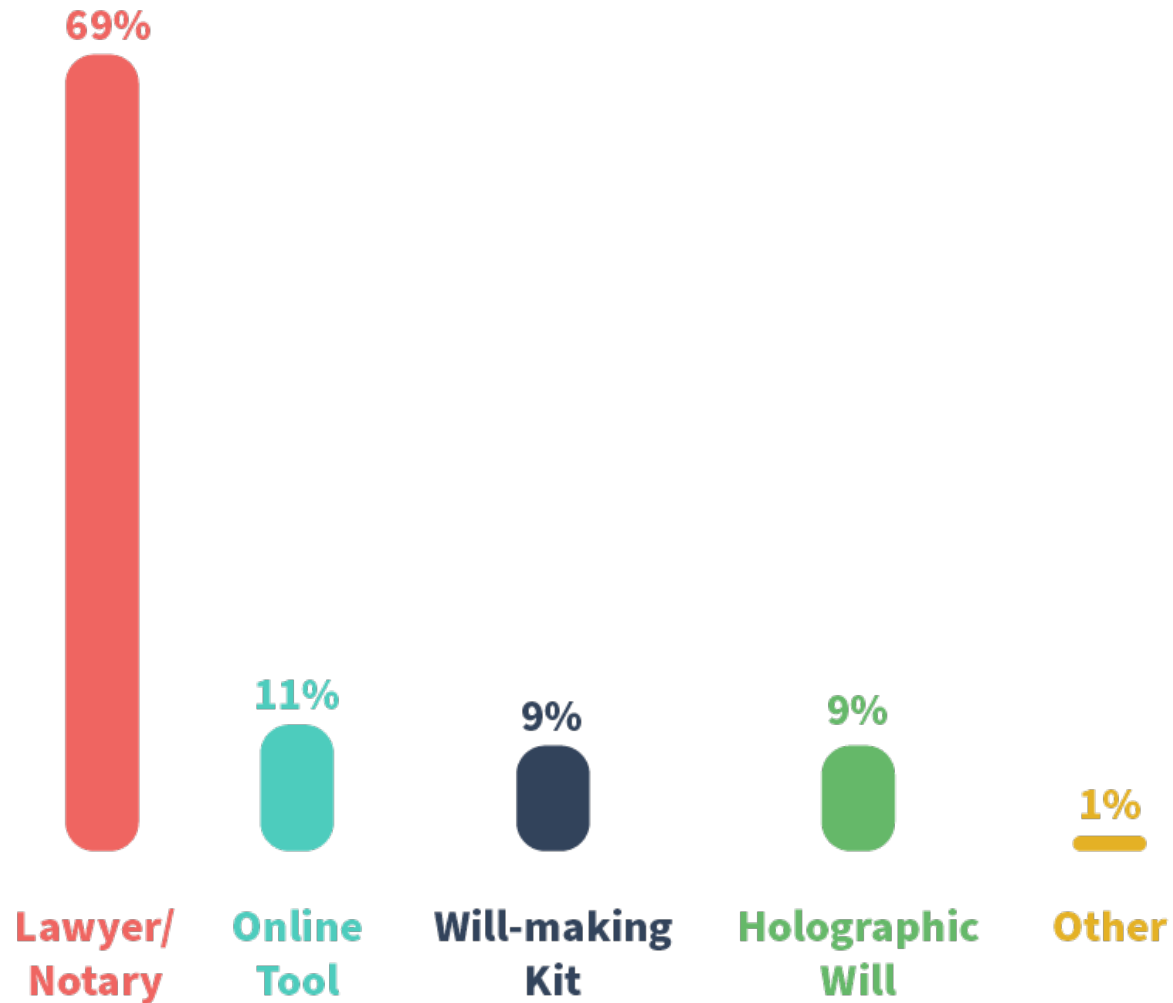
Will-making by Family Status



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SURVEY:
Method of Will Creation

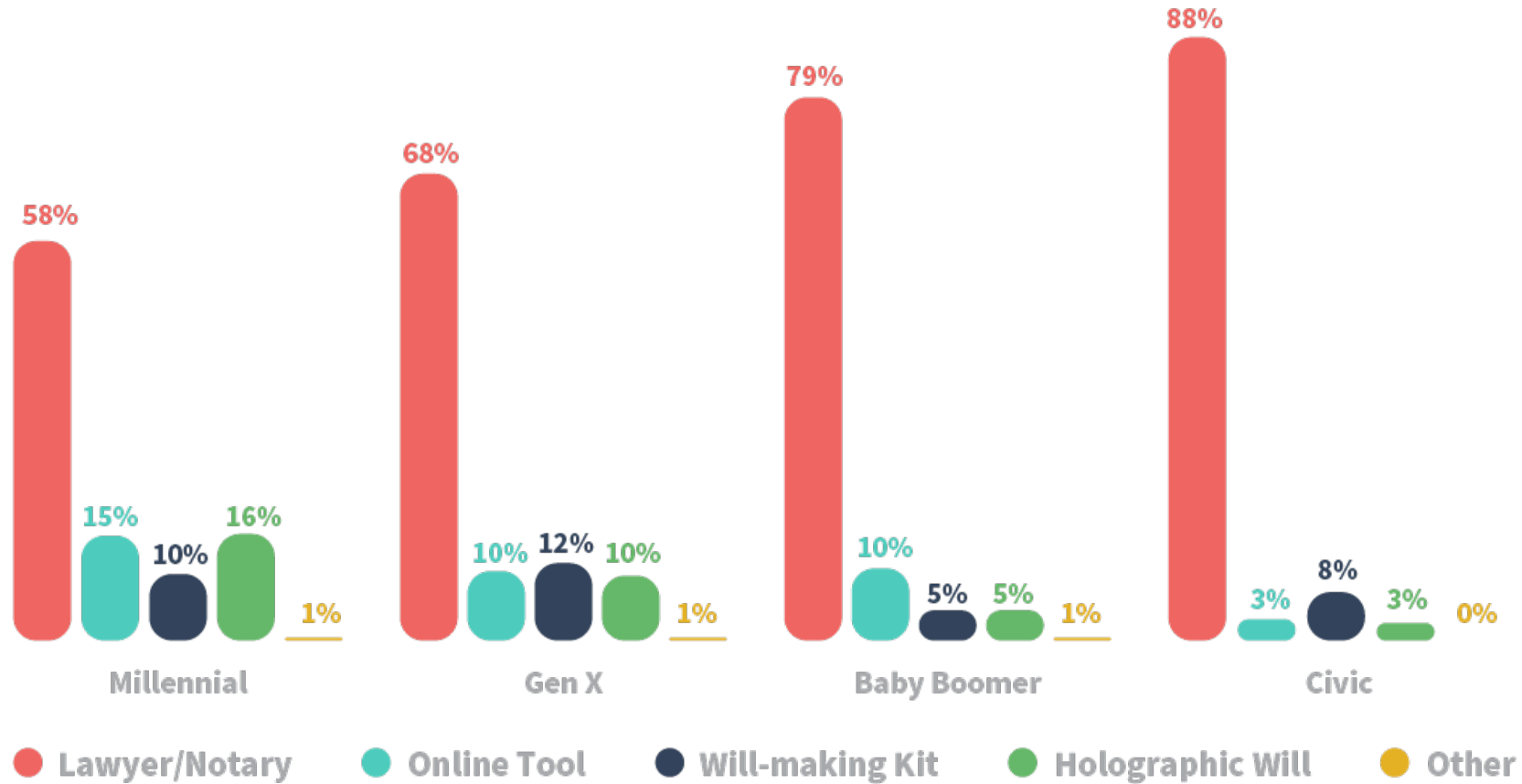


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SURVEY:

Method of Will Creation by Generational Cohort

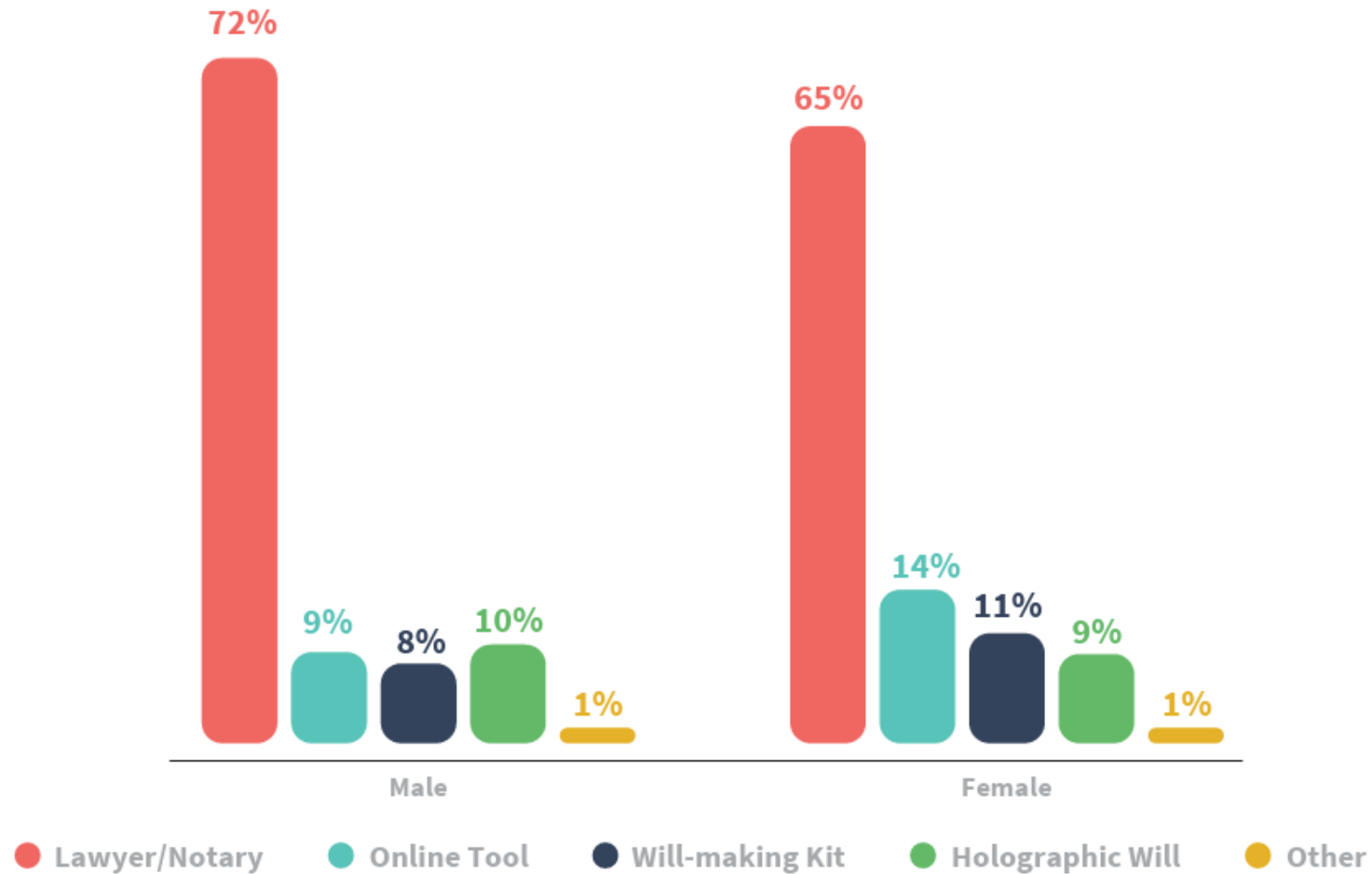


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SURVEY:

Method of Will Creation by Gender



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Bequesting In Canada

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SURVEY:
Beneficiary Breakdown

Children

51%

Spouse

60%

Other family

23%

Charity

9%

Friends

6%

Church

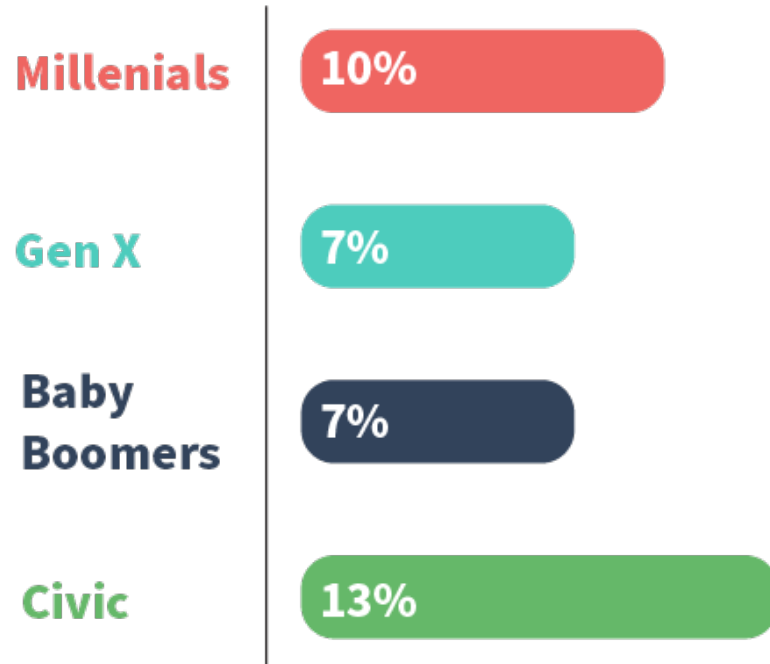
2%

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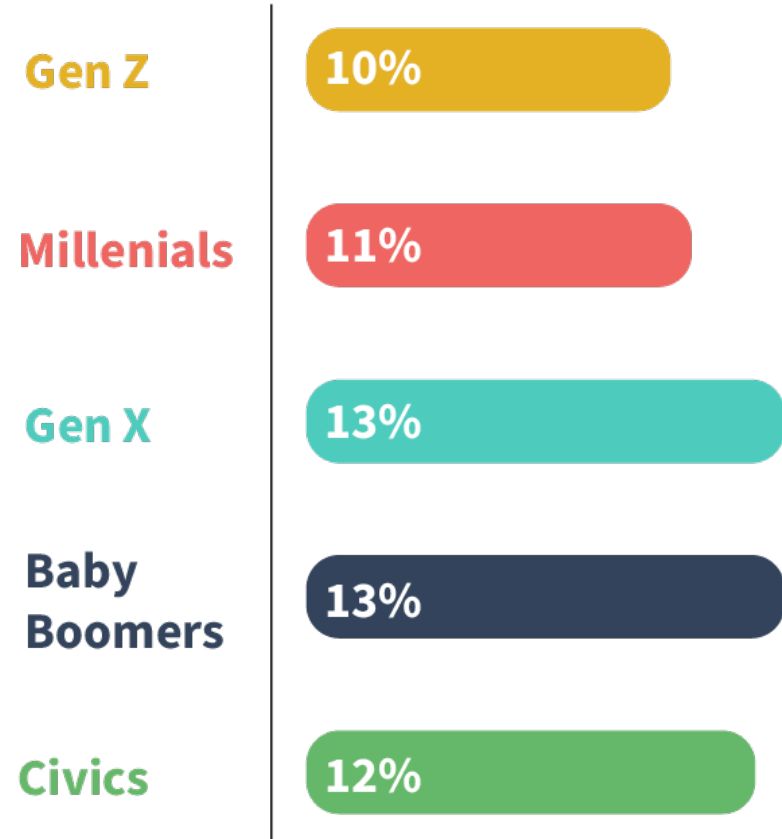


Bequests by Generational Cohort

SURVEY:

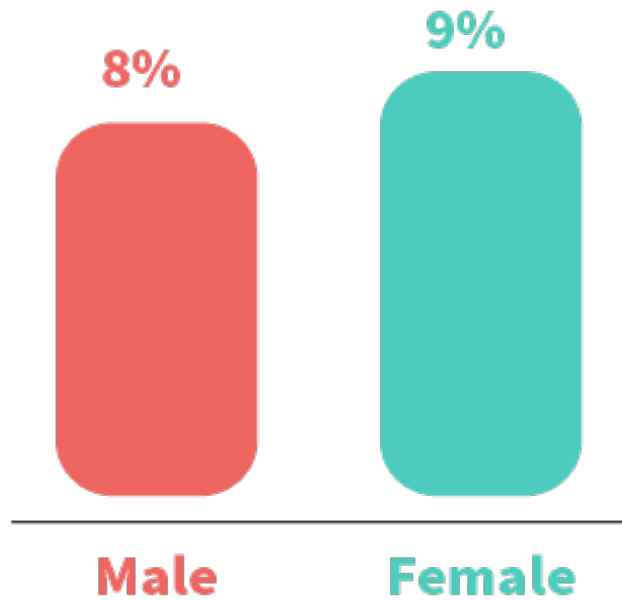


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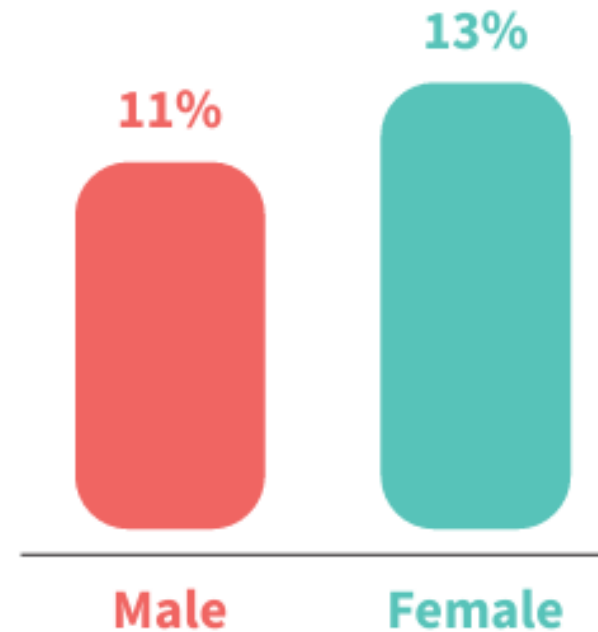


Bequests by Gender

SURVEY:



ONLINE:

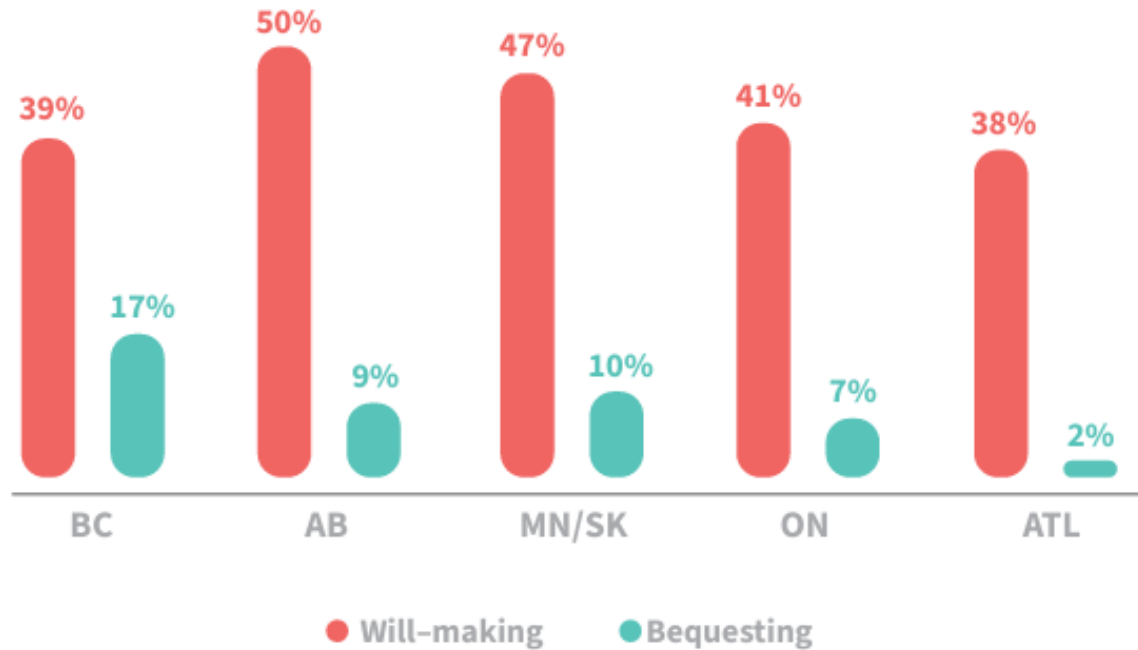


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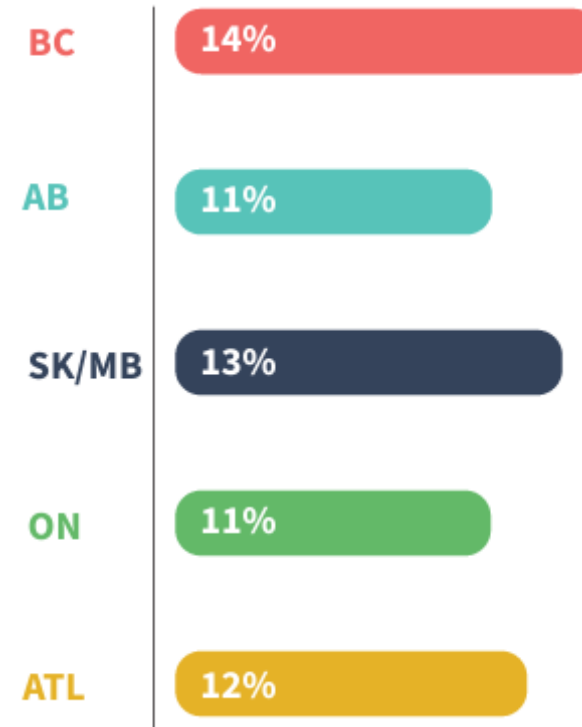


Bequests by Province

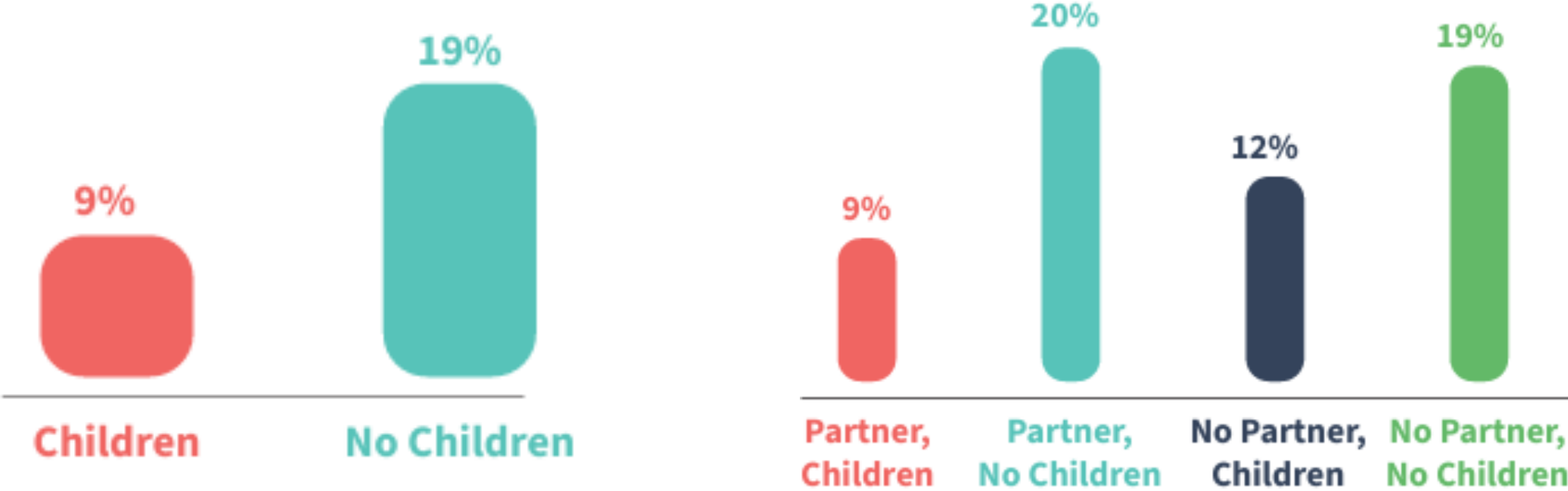
SURVEY:



ONLINE:



ONLINE:
Bequests by Family Status

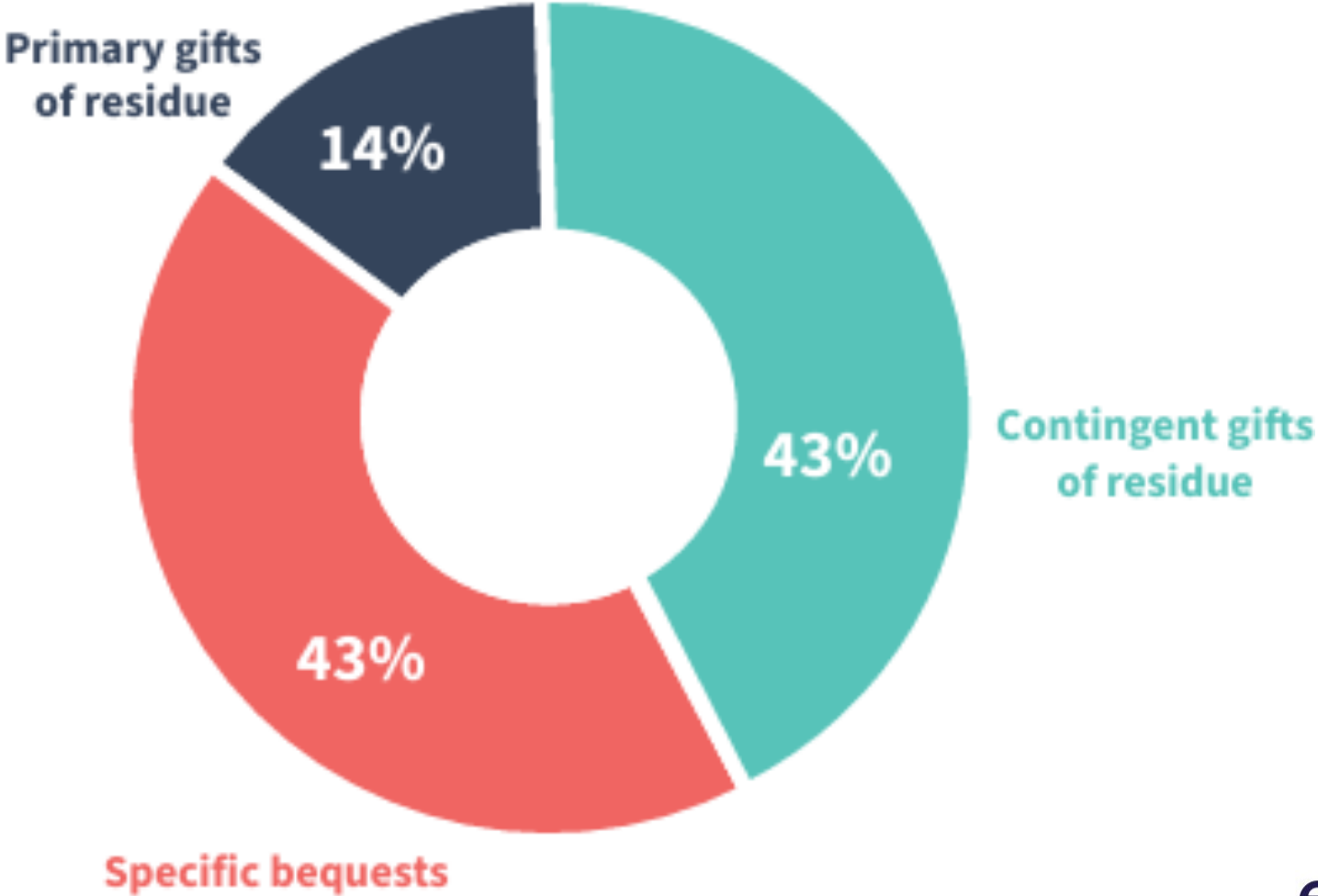


Unpacking Online Bequesting

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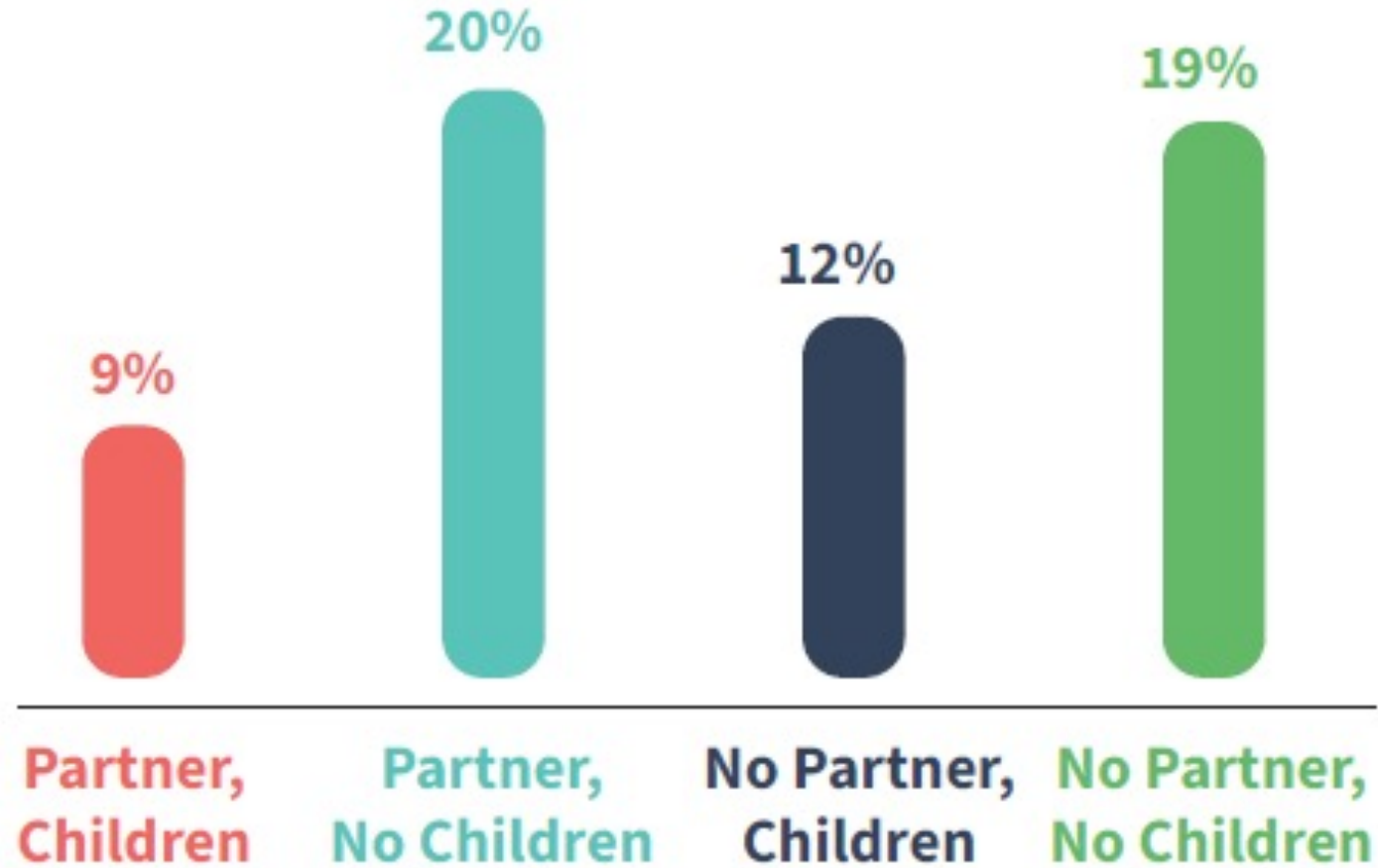


ONLINE:
Types of Gifts



ONLINE:

Gifts of Residue by Family Status

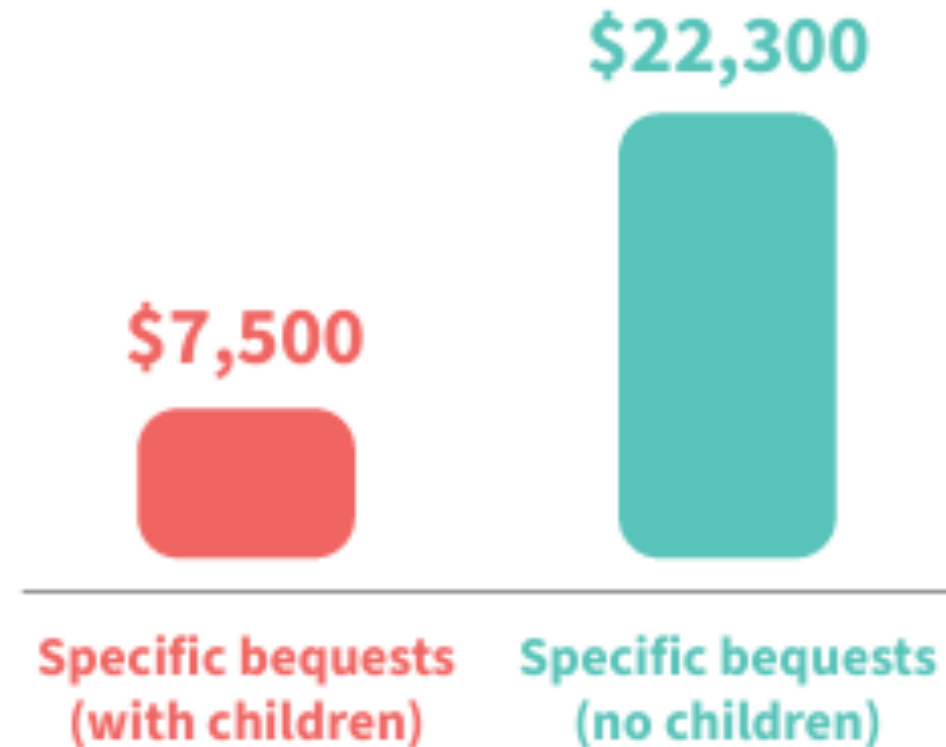


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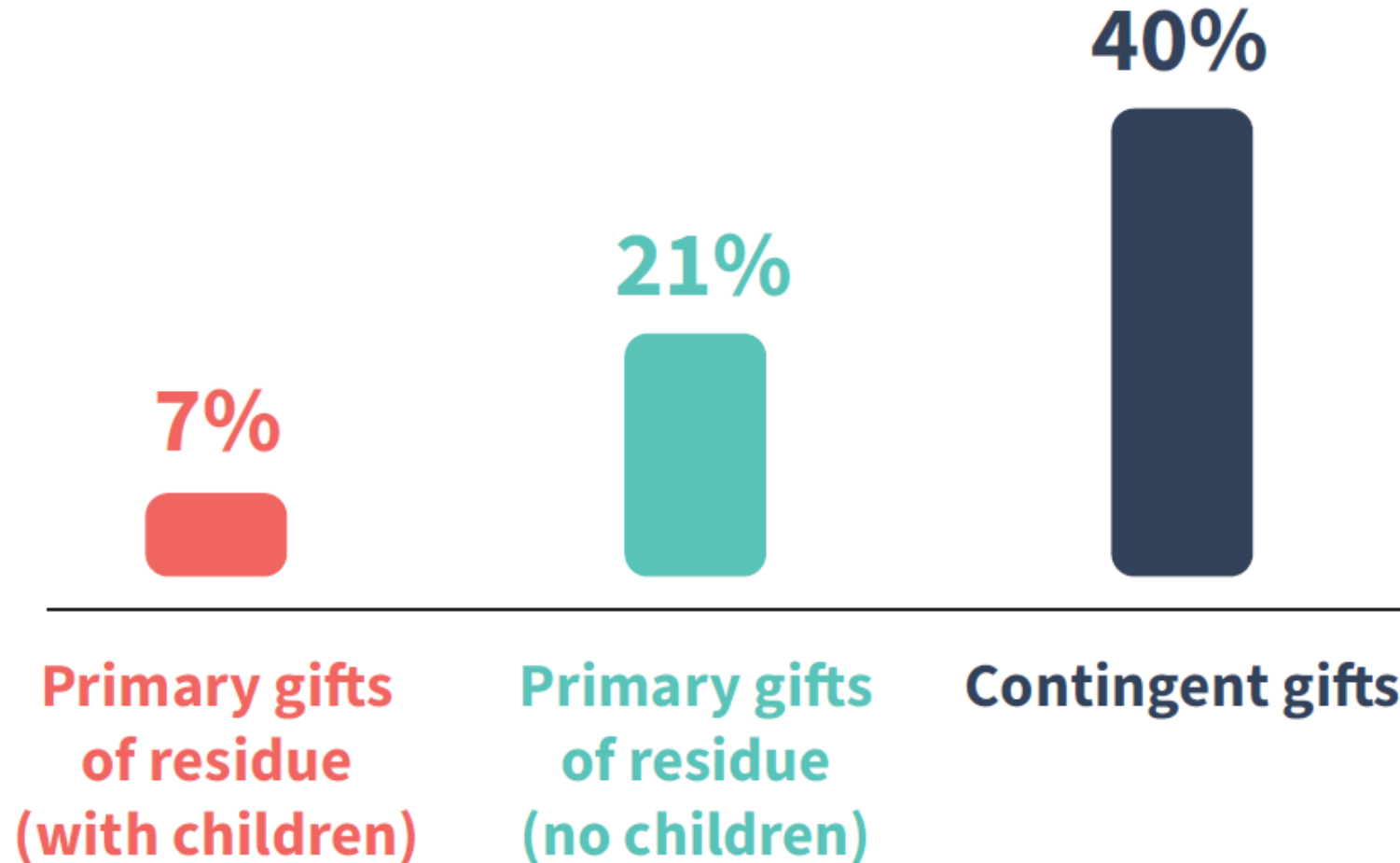
ONLINE:

Specific Bequests by Family Status



ONLINE:

Gifts of Residue by Family Status



**Primary gifts
of residue
(with children)**

**Primary gifts
of residue
(no children)**

Contingent gifts

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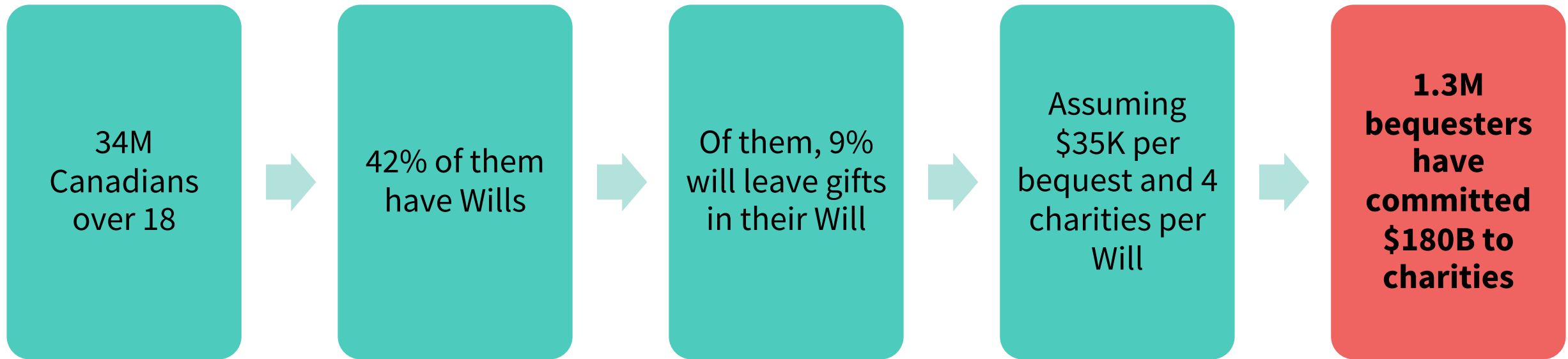


Modelling The Market

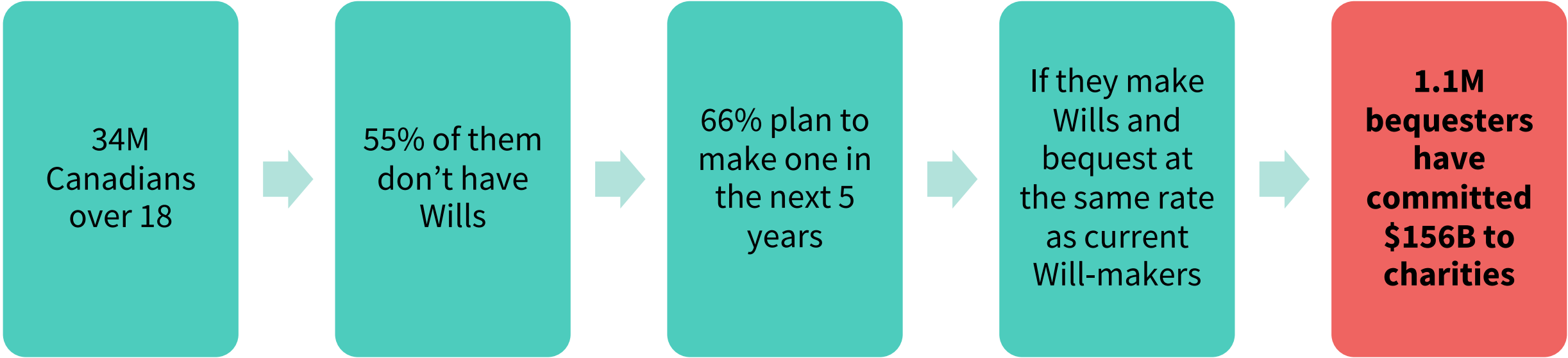
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SURVEY:
The Legacy Market Today



SURVEY:
The Legacy Market Tomorrow

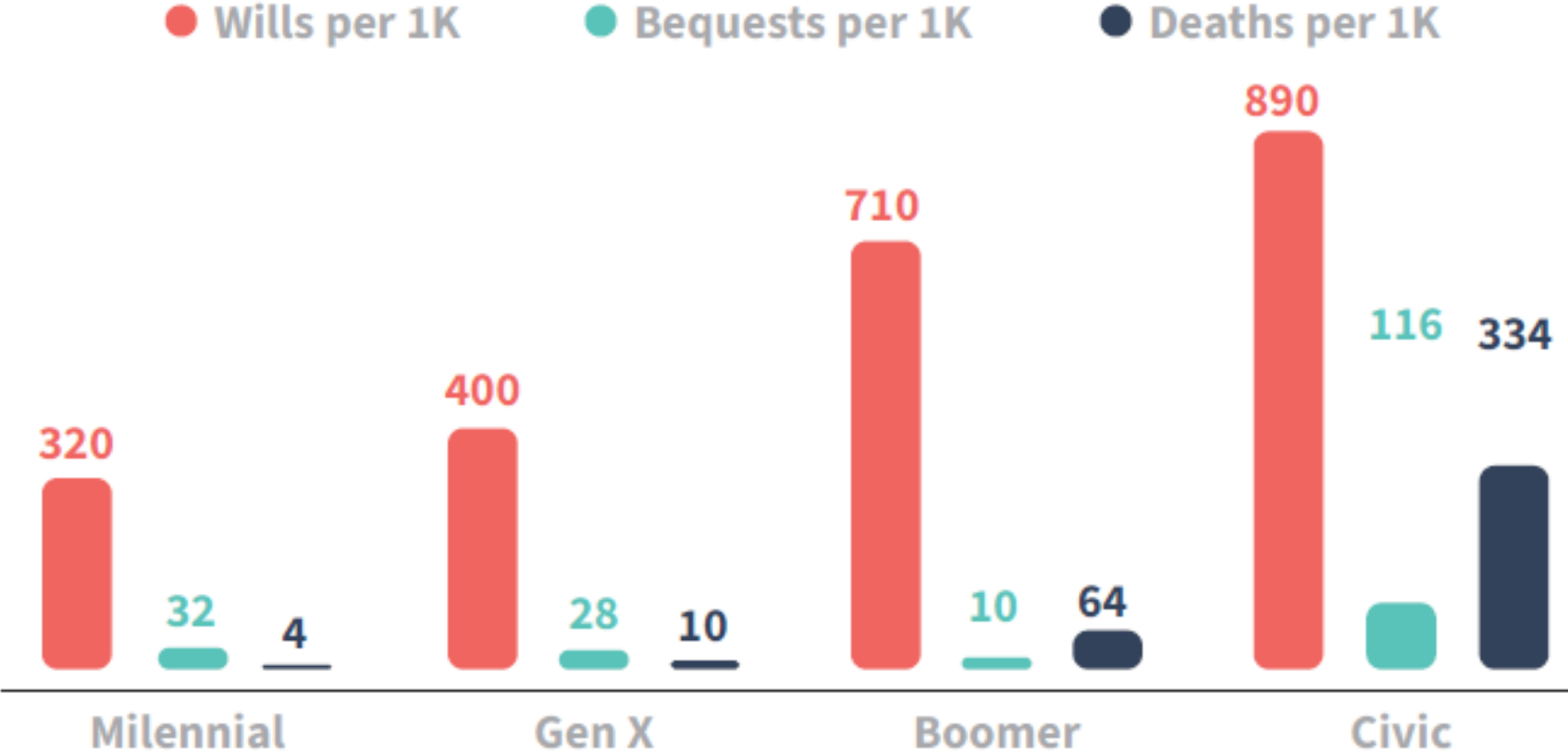


Trends & Takeaways

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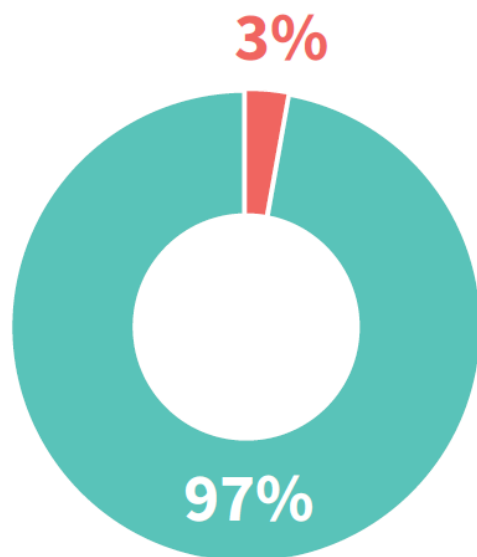
SURVEY:
Offsetting Civic Mortality



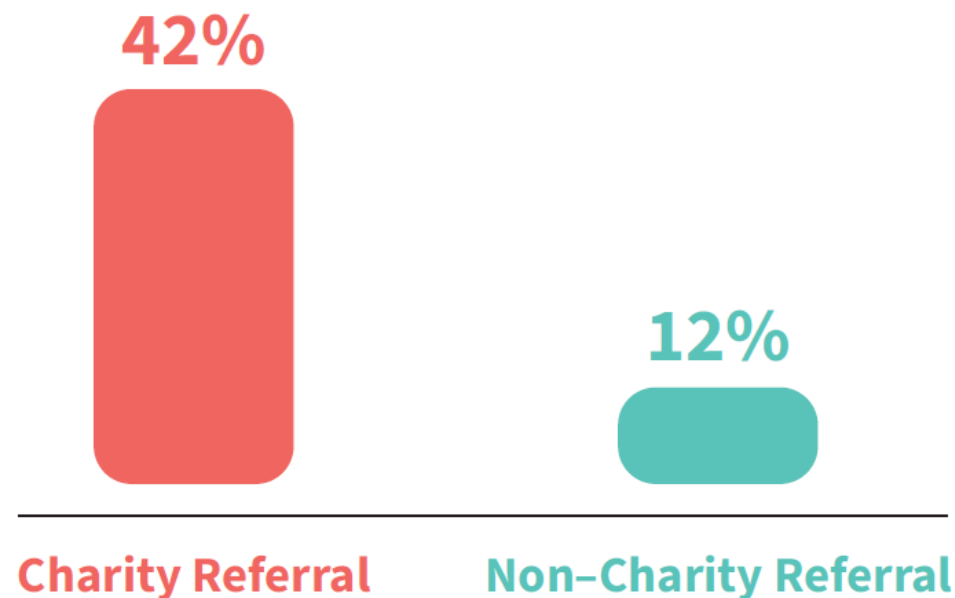
ONLINE:

Charity Referrals to Online Will Platforms

Source of Traffic



Rate of Legacy Giving



● Charity Referral ● Non-Charity Referral

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