

A Conversation Guide

Talking to loved ones about leaving a gift in your Will

Why it's important to talk about your wishes

Leaving a gift in your Will to a charity is a meaningful way to ensure your values live on. But it's also natural to worry about how the important people in your life might feel. This guide will help you prepare for a compassionate, open conversation – one that honours your legacy while respecting your loved ones.

Step 1: Be clear on your why

Before speaking with loved ones, reflect on why this gift is important to you. This will help you communicate with clarity and confidence.

Ask yourself:

- What causes have shaped my life?
- What kind of impact do I want to make beyond my lifetime?
- What legacy do I want to leave for future generations?

Step 2: Prepare for the conversation

Timing matters

Choose a quiet moment where you can speak without distractions or urgency.

Be ready for questions

Anticipate what your loved ones may be feeling.

Consider putting your plans in writing

Sometimes a heartfelt letter or short note can open the door for further dialogue.

Step 3: What to say and how to say it

Here are some **gentle conversation starters** and **talking points** to help guide the discussion.

Opening the door

- “There’s something important I’ve been thinking about, and I’d like to share it with you.”
- “I’ve been thinking about the values I want to leave behind, and how to express those in my Will.”
- “I’d like to have a conversation about my plans for my estate after I’ve passed.”

Explaining your decision

- “Supporting [*charity name*] has always mattered to me, and I want that support to continue after I’m gone.”
- “This gift doesn’t replace what I’m leaving to you. It reflects a part of me I’d like the world to remember.”

Final thoughts

By bringing your loved ones into the conversation, you’re offering them a window into your heart – and an invitation to celebrate and honour what matters most to you.

Step 4: Acknowledge their feelings

Your loved ones may have questions or even concerns. That’s OK. Common reactions include:

Surprise or discomfort

- Give space for dialogue: “I understand this might be unexpected. I’m here to talk about it, not just announce it.”

Concern about inheritance

- Reassure them: “This gift is just one part of a broader plan. My priority has always been your well-being.”

Uncertainty about the cause

- Share your personal connection or story. Help them see the values behind your choice. For example, “With my gift I hope to make the world a healthier place for you and your children.”

Step 5: Keep the conversation going

This doesn’t have to be a one-time conversation. You can:

- Revisit the topic later
- Offer to show them your Will plans
- Involve them in your charitable interests. You might wish to invite them to a charity event or meeting.

More questions?

Email us at PlannedGiving@heartandstroke.ca or call 1-800-205-4438.

