ADVISORS with Purpose

FAQ

WHO IS ADVISORS WITH PURPOSE?

Advisors with Purpose is part of the family of ministries of Financial Discipleship Canada. They are committed to serving donors and charities by working in partnership to provide specialists who can help people through a strategic estate planning process.

IS THERE A COST TO CONNECT WITH AWP?

No – this service is free to you as one of our supporters. You can call them for general advice and answers, but the real power is in helping you walk through a complete estate plan.

IS THIS ONLY FOR THE WEALTHY?

Most of us are unaware of the tax implications of our RRSP's, life insurance, vacation homes, and other assets. Estate Planning is for everyone and isn't just about assets, but also includes things like the selection of your executor, guardianship of children, power of attorney, talking to your family, and making sure you have everything in order.

WHAT IF I AM NOT AS FAMILIAR WITH FINANCIAL TERMS?

The process is more about helping you create a meaningful legacy through your Will. Their specialists will listen to your heart and values and help you better understand your options. At the end of this process you will receive a full, personalized estate plan online or by mail that will clearly outline and explain your next steps.

WILL THE CHARITY GET A COPY OF THIS PLAN?

No – this is a confidential process and Advisors with Purpose will never share personal information with anyone.

DOES AWP WORK WITH PEOPLE ANYWHERE IN CANADA?

Yes, they can work with anyone across Canada. All meetings are done by phone or zoom.

IF I CONTACT AWP, DO I HAVE TO DO A FULL PLAN?

Although many people do require a full plan, sometimes information, guidance, and reassurance of what has already been done is what is required. They meet with you to discuss your specific needs and tailor their services to you.

WILL AWP WRITE MY WILL?

No. They will not write your Will, but the estate plan you receive from your estate specialist will give you the information you need when meeting with your lawyer or using an online platform to complete your Will.

HOW DO I CONTACT AWP?

- You can contact Advisors with Purpose directly by phone **(1-866-336-3315)** or email **(plan@advisorswithpurpose.ca)** or via the link on our website to book an appointment with an Estate Specialist
- AWP will send you a link or a form to complete with general information about your assets, family, and heirs. No account information, or passwords will ever be requested.
- The Estate Specialist meets with you by phone or zoom, reviews your information, asks key questions, and helps you consider some options
- A personalized plan is prepared for you and is sent to you online or by mail.