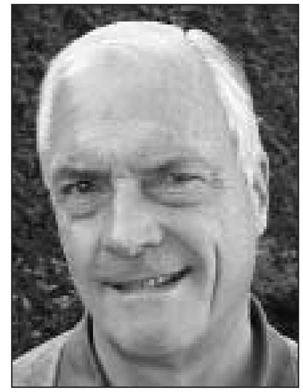
William R. Harvey



The "Compleat" Advisor

Calls such as this come unexpectedly. The caller identified himself as the executor of two estates in which Heart and Stroke Foundation BC & Yukon is named as a beneficiary. A husband and wife with mirrored Wills had died within two days of each other. Would the Foundation have a representative available for a graveside ceremony at 11:30 the following Sunday? The Sunday in question was on Labour Day Weekend, but I knew I needed to be there.

Arriving at the cemetery, I realized the small group of attendees was comprised of mostly elderly and quite religious people. At first glance, the man officiating appeared far too young to be wise. Although much of the ceremony was not conducted in English, the dedication address was. I soon realized I was having a rare insight into the role philanthropy played within their faith. It was apparent that philanthropy was a very central issue.

There are, the man stated, three philanthropic precepts of the couple's faith.

- A good person of that faith should provide in his or her estate for education.
- A good person of that faith should provide for the elderly.
- Finally, a good person of that faith should make a gift that relates to the wider community.

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Having read the identical Wills of the testators beforehand, I realized this childless couple had followed the teachings of their faith to the letter; they had divided their estates into three equal parts—with the third share bequeathed to our Foundation.

Although philanthropy is an important consideration in most if not all major religions of the world, how often is the subject considered when estate planning is taking place? It is through gaining an awareness of cultural and religious diversities that we who serve the public will be better able to assist in the major decisions relating to client values. How easy it would be to ask, "Have you considered including a charitable bequest in your estate plans?" How much that would set us apart from other advisors. ▲

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