COMMUNITY FOUNDATION of Snohomish County

A Legacy with Impact:
Applying a Social & Racial Justice Framework to Estate Planning

Our country has been confronting the systemic injustices suffered by Black, Indigenous and other People of Color on a national level. Individuals and institutions have been reckoning with America's racist past and have expressed a desire and determination to build a more just and inclusive world through their personal behavior, work, advocacy, volunteering, political action and charitable contributions. There is an additional and important way for individuals to take part in the pursuit of greater equity – they can also apply a social and racial justice framework to estate, financial, and charitable planning.

What does estate planning have to do with the racial justice movement?

Estate planning involves the management, transfer and use of wealth predominantly owned by whites, so it has played a role in the perpetuation of the wealth divide among whites and people of color. Estate planning involves values, relationships, personal capital and social capital, all of which could incorporate the quest for greater social and racial justice. Estate, financial, and charitable planning offer individuals an opportunity to leave impactful legacies to their families and communities for which they will be permanently remembered.

What will this webinar cover?

- Some of the historical origins and enablers of the racial wealth gap
- Current indicators of income and wealth inequality
- Ways professional advisors can engage clients in conversations about their values, legacy and philanthropy, especially as it relates to racial and social justice
- Tangible examples of how a social and racial justice framework can be incorporated in estate and financial planning as well as in planned giving
- Why being able to address these issues and offer options for clients is critical to creating and maintaining your position as the "trusted advisor" for clients and their heirs.

For more information and resources on applying a racial & social justice framework to estate and financial planning, please contact:

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