

# Estates Management Funding Program

Application Guide



Indigenous Services  
Canada

Services aux  
Autochtones Canada

Canada

## The Estates Management Funding Program

The objective of Estates Management funding is to provide opportunities for Indigenous individuals, communities and organizations to support strong governance, developing or enhancing administrative systems, and capacity building for effective estates planning and administration and to support dependent adults living on-reserve.

Indigenous Services Canada (ISC) acknowledges the importance of estate planning and is committed to supporting the development of estates administration capacity, access to estates management resources, and facilitating Indigenous ownership over the management of estates services. This commitment extends to supporting Indigenous communities and organizations as they navigate the intersection of estates management and settlements between Indigenous communities and the Government of Canada to which an estate may be eligible.

### Who Can Apply?

The Estates Management Funding Program is open to any individual or organization with an interest in advancing Indigenous estates governance capacity. Priority will be given to Indigenous individuals or organizations.

### What Types of Initiatives can be Funded?

Most initiatives can be funded so long as they support at least one of the following objectives:

- Developing Indigenous community governance capacity for the administration of estates;
- Exploring, developing, and/or advancing alternative management frameworks for the management of estates services;
- Increasing the number of wills written by First Nation and Inuit individuals;
- Developing and/or disseminating tools that will increase awareness and capacity around estates management at the individual or institutional level;
- Hosting workshops, information sessions or other estate management activities; or,
- Increasing support for Indigenous communities affected by settlement agreements that impact decedent estates and/or the surviving heirs/beneficiaries of an estate.
- Developing community capacity to better support dependent adults living on-reserve;
- Increasing support for Indigenous dependent adults to better access settlement agreements for which they may be eligible; and
- Providing support services for Indigenous dependent adults.

### Items that Cannot be Funded

Please note while many types of initiatives can be funded, there are certain ineligible expenses that cannot. They are:

- Meals/catering
- Incidentals
- Prizes
- Gifts

## How to Apply

A call for proposals takes place annually. More information can be found on the ISC website and is communicated annually through outreach initiatives. Proposals need to be submitted during the scheduled callout period to be considered for funding in the current fiscal year.

Proposals need to include a completed [Estates Management Funding Program Application Form](#) (form PAW #3869162) including a description of the project, its objective(s), key activities, budget, outputs and expected outcome(s).

**Items to be included directly on the [Estates Management Funding Program Application Form](#)** (form PAW #3869162):

1. Who is applying
  - If a community or an organization is applying, please specify the community or type of organization (First Nation, educational institution, NGO, etc.)
2. A concise description/summary of the proposal
  - Briefly identify:
    - the proposal objectives,
    - how the proposal aligns with at least one of the goals identified above and how the applicant has the mandate and capacity to support the pursuit of that goal,
    - the amount being requested (budget summary),
    - any planned activities, and
    - the anticipated outcomes
  - Identify whether or not this initiative has previously received funding from the Estates Management Funding Program. If funding was previously provided, please provide a summary of the previous proposal and its outcomes.
  - If a proposal is being submitted on behalf of multiple communities or organizations, or with the intention of delivering services to multiple communities or organizations, please include evidence of the parties' informed consent to their inclusion in the proposal. This could be a signed letter from a First Nation administration or organization or a similar type document.
3. A completed "Declaration" – the final section of the [Estates Management Funding Program Application Form](#) (form PAW #3869162):

**Items to be included as Supporting Documentation:**

1. A detailed description of the project including:
  - proposal objective(s);
  - how the proposal aligns with at least one of the Estates Management Funding Program objectives listed above;
  - key activities and how they support the proposal objective(s);
  - timelines/critical paths covering all activities in the proposal; and
  - expected outcome(s) and how they support the proposal objectives and at least one of the Estates Management Funding Program objectives listed above.
2. A detailed, itemized budget that includes all components of the proposal;

3. A demonstration that the applicant possesses financial management controls and practices (e.g. references to institutional capacity, other programs/projects that the applicant administers, letters of reference, etc.).

It may be helpful for applicants to approach the [Estates Management Funding Program Application Form](#) as a top-sheet summary of the proposal with the supporting documentation providing a more fulsome overview of the initiative.

## Submitting your Proposal

Completed proposals can be submitted to either:

### By email:

[financementsuccessions-estatesfunding@sac-isc.gc.ca](mailto:financementsuccessions-estatesfunding@sac-isc.gc.ca)

### By post:

Trust Moneys, Estates and Treaty Annuities Directorate  
15 Eddy, 6th floor  
Gatineau, Quebec, K1A 0H4

## Review and Funding

Proposals will be reviewed by ISC. All applicants will be notified via email with details about whether the proposal will be funded. Successful applicants will have to provide confirmation that they want to accept or reject the funds. Next, ISC or CIRNAC regional office staff will contact applicants to coordinate a funding arrangement and the transfer of funds

### FUNDING OPTIONS

#### Unexpended funding:

Recipients may retain unexpended funding from a fiscal year to expend in the 1-year period immediately following the fiscal year for which it was provided on eligible activities and expenditures as outlined in these guidelines

#### Reallocation of Fixed Contribution Funds:

During the fiscal year, recipients may reallocate a reasonable percentage of funds among the eligible activities and expenditures of their ISC-approved proposal for the Estates Management Funding Program. Recipients need to obtain approval from ISC staff responsible for the program in their region before reallocating funds

## Reporting

Per the terms and conditions of the Estates Management Funding Program and the funding arrangement entered into by successful applicants and ISC, there is a requirement for the applicant to report on the use of funds. While there is no set standard for what this report must look like, successful applicants will receive a template to help facilitate the reporting process.

## Contact Us

For any questions or comments, or to submit a proposal, please email:

[aadnc.financementsuccessions-estatesfunding.aandc@canada.ca](mailto:aadnc.financementsuccessions-estatesfunding.aandc@canada.ca)

We are always happy to answer any questions and look forward to hearing from you!

# Examples of Eligible Projects and Expenses

## Examples of Eligible Projects:

- Providing workshops on planning estates and writing Wills;
- Training membership clerks to assist with estates administration;
- Providing sessions with lawyers to assist them in helping First Nation members write Wills;
- Assisting First Nation members to attend conferences, workshops, information sessions on estate administration and planning (e.g. NALMA Estates Management Toolkit workshops);
- Providing workshops on planning for possible illness, accident or other disability that may leave individuals unable to manage their financial affairs.
- Assisting First Nations community members with applications for settlement agreement compensation by providing information sessions or workshops.

## Examples of Eligible Expenses:

- Salaries and wages.
- Office overhead and rent (office administration expenses).
- Professional services (includes honorariums)..
- Travel and accommodation costs (e.g. hotel room, airfare, gas, taxi, car rental for the duration of the activity/session).
- Communication material development and distribution
- Estates training and tuition/admission fees for estates related courses.
- Systems design (for estates management).
- Implementation and maintenance of estates management systems.
- Purchase of hardware and/or software needed to support data collection, analysis and reporting on estates management and related activities.

## Ineligible Expenses

- Meals/catering
- Incidentals
- Prizes
- Gifts

## Estates Management Funding Program Application Checklist

Estates Management Funding Program Application Form		<input type="checkbox"/>
1	Indicated who is applying (if a community or organization, specified the community or the name and type of organization applying)	<input type="checkbox"/>
2	Completed a concise summary/description of the proposal directly on the Estates Management Funding Program Application Form that briefly identifies:	<input type="checkbox"/>
	○ the proposal objectives	<input type="checkbox"/>
	○ how the proposal aligns with at least one of the goals identified above and how the applicant has the mandate and capacity to support the pursuit of that goal,	<input type="checkbox"/>
	○ the amount being requested,	<input type="checkbox"/>
	○ any planned activities, and	<input type="checkbox"/>
	○ the anticipated outcomes	<input type="checkbox"/>
3	The “Declaration” section is completed	<input type="checkbox"/>
Supplemental Documentation		<input type="checkbox"/>
1	Included a comprehensive breakdown of the proposal that speaks to:	<input type="checkbox"/>
	○ proposal objective(s);	<input type="checkbox"/>
	○ how the proposal and its objectives align with at least one of the Estates Management Funding Program objectives;	<input type="checkbox"/>
	○ key activities and how they support the proposal objective(s);	<input type="checkbox"/>
	○ timelines/critical paths covering all activities in the proposal;	<input type="checkbox"/>
	○ expected outcome(s) and how they support the proposal objectives and at least one of the Estates Management Funding Program objectives listed above.	<input type="checkbox"/>
2	Provided a detailed, itemized budget that speaks to all components of the proposal;	<input type="checkbox"/>
3	Demonstrated/indicated the presence of financial management controls and/or practices (e.g. references to institutional capacity, other projects that the applicant administers, letters of reference, etc.)	<input type="checkbox"/>

*Please note that this checklist does not need to be included as part of your proposal, it is intended as a tool to assist applicants in ensuring that their proposals are complete upon submission.*