Table of Contents

Touch or click on any of the following page titles to jump immediately to that section.

03. Leadership Message
04. Board of Directors
05. Education
06. Conference
07. Membership
08. Will Power
09. Chapters
11. Committees
12. National Advisor Council
13. Funders & Sponsors
14. Gratitude Report
16. Donors & Supporters
18. Financials
19. About Us
Leadership Message

CAGP shone again in 2022, demonstrating our continued resilience and ability to adapt. Despite being armed with a solid roadmap for the year on January 1st, by January 15th it was entirely turned on its head as the pandemic continued to interfere with plans and schedules. Where it would have previously been incomprehensible to do things like cancel a national conference or change its dates just a few months before, in just two years we experienced both!

We have weathered many challenges with grace and success, and this year we are particularly pleased to share with you a picture of the tremendous impact CAGP continues to have on our mission. In this report you will discover the fantastic results we are already seeing across the organization, such as the outcome of the many courses and webinars we’ve delivered with excellence. Additionally, participants in our annual National Conference on Strategic Philanthropy continue to tell us it is among the very best fundraising conferences in the country, and the exceptional Will Power campaign, now in its third year, continues to see impressive uptake.

Not only that, but our membership continues to grow, surpassing 2021’s record numbers and revealing that the community of professionals that make up CAGP are deriving much value. In this report, we are also thrilled to celebrate the many volunteers, supporters, partners, and donors who make the CAGP movement so unique.

In many ways it was a reflective year for CAGP’s leadership. We are nearing the end of our current strategic plan and are considering our future aims and goals. As we evaluated our performance, we noted that, while the pandemic was undoubtedly disruptive, there were also areas where it accelerated some of our plan’s objectives. For example, we successfully delivered education in a virtual setting and offered more French-language webinars and the fully bilingual Volonté de faire (Will Power’s francophone equivalent campaign).

Current societal and sector issues and trends encouraged us to lead and lean into conversations on philanthropy and its intersection with inclusion, equity, and social justice and, as an essential first step, work to achieve more diversity in our membership. We were honoured to join The Circle on Philanthropy and to have a team participate in their remarkable Partners in Reciprocity fellowship program. We look forward to continuing to integrate a reconciliation lens in our programs, policies, and operations. These will be essential pillars as we look forward to strategic planning in 2023.

This year’s Impact Report wraps up with a message of gratitude from the CAGP Foundation, and we echo that message as the voice of CAGP. We applaud the superb staff team and remarkable volunteers who continue to deliver CAGP’s mission and message with excellence and passion.

Heather Powers
Chair of the Board of Directors

Ruth MacKenzie
President & CEO
With thanks to the CAGP Board of Directors

Heather Powers
Chair

Geoff Graham, CFRE
Vice Chair

Serena Hak
Secretary

Danzel Pinto
Treasurer

Kathy Arney

Michael Blatchford

Carmela Guerriero

Jill Nelson, CFRE

Laily Pirbhai
Education

We delivered two Gift Planning Fundamentals online, continued with our Webinar Wednesdays series and launched a successful Bequest Administration Essentials course. We returned to in-person Conference, Original Course and Advanced Summit. We delivered 26 “in-house” gift planning training sessions and speaking engagements, customized to individual clients.

Total engagements with CAGP education in 2022

5,662 Engagements
Conference

The 2022 CAGP Conference was held in beautiful Halifax, NS, where 330 delegates attended from across Canada. The theme was Rise Again, Navigating The Future. The topics presented during the conference have led to a continued commitment by CAGP for diversity, equity and inclusion in our work, led by the FRANK Talks plenary where we touched on “A Reimagined Future of Philanthropy - Are we courageous enough for transformative change?”.

2022 In-person Conference

330 Delegates
Membership

In 2022, CAGP saw its highest recorded membership numbers ever, despite challenges brought on by the pandemic. We had 1,441 active members as of December 31, 2022 and new members continue to join.

1,441
Active members
as of December 31, 2022

281
New Members
joined in 2022

59
Organizations with
Group Memberships

289
Members are
Will Power Partners

Friends of CAGP

In 2022, Fraser Green and Jasmine Sweatman were recognized for their contribution and dedication to the mission of CAGP.

Fraser Green
Good Works

Jasmine Sweatman
Sweatman Law Firm
In the past three years of the Will Power campaign, we’ve seen the dial move a lot! When we started the campaign we saw that only 5% of Canadians had left a gift in their Will; according to public polling done with Environics in 2022, we now see that 8% of Canadians have left a gift in their Will. That’s 1.2M more Canadians that have left an expected $38B for charities in their Will.

In 2022 the Will Power campaign expanded its reach. 18% of the public now say they are aware of the campaign, and 2.7M Canadians say they are now thinking about leaving a gift in their Will because of the campaign.

None of this could have been accomplished without our seed funders and our community of 550 charities and professional advisors who have invested in the campaign and amplified the movement. Will Power partners appreciate the accessibility and flexibility of the campaign, allowing them to easily complement their own planned giving programs. The Will Power campaign is a collective movement promoting collaboration and advancing legacy giving across the country together with our partners.

In the past 3 years, the number of Canadians who have left a gift in their Will has risen from 5% to 8%

18% of the public now say they are aware of the campaign

2,700,000 Canadians say they are now thinking about leaving a gift in their Will because of the campaign
To our 17 chapters across Canada led by 154 passionate professionals in gift planning, we are beyond grateful for your dedication and hard work. CAGP’s success results each year from the time and expertise you bring to your regions.
Windsor & Essex County
Lisa Kolody – Chair
Mike Flanagan
Kelly Gosselin
Sandra Presland
Pat Valleau
Peggy Winch

Chatham-Kent
Lisa Caron – Chair
Jodi Maroney
Margery Muharrem
Anne Taylor

London
Vicki Hayter – Chair
Gord Baptist
Adam Chapman
Sarah Morkin
Justin Pilon

Waterloo-Wellington
Lynn Whetham – Co-Chair
Lana Dadson – Co-Chair
Landon Jennings
Jessica Wroblewski

Niagara-Golden Horseshoe
Carol Rame – Chair
Darlene Bennett-Howes
Lisa Bono
Amanda Braet
Joan Cosby
Graeme Dargavel
Gena Dureault
Carrie Gemmell
Joanne Harris-Bedford
Matina Singh
Marla Smith

Greater Toronto Area
Janice Correa – Co-Chair
Karen Hudson – Co-Chair
Ryan Armstrong
Marisa Barlas
Julie Brown
Clara Eta
Becky Fallis
Tammy Garcia
Arundel Gibson
Angus Gordon
Ann Gorwill
Serena Hak
Promod Sharma
Phoebe Uguy
Alice Wu

Ottawa
Mitch Miller – Chair
Paul Brousseau
Charlotte Field
Nadine Fowler
Betty-Anne Howard
Katie Loftus
Chelsea McIntyre
Erin Meisner
Maurice Prevost
Megan Doyle Ray
Selva Trebert Sharman

Quebec
Antonietta Nicolo – Chair
Gina (Luigia) Di Filippo
Nancy Perry Dossous
Samar El Soufi
Susan Elias
Lucille Grimard
Jeremy Hampson
Catherine Huard
Natalia Kistruga

Sylvain Ladouceur
Nancy Lepage
Julie Roy
Véronique Salibur
Catherine St-André

Nova Scotia
Sara Burke – Chair
Natalie Bobbitt
Toni Croft
Siobhan Doherty
Liz Finney
Geoff Graham
Laura O’Brien
Lori Scott
Heather Strickey
Committees

We also recognize the vital role of our committees and the expertise and support they bring to our work across the nation.

We extend our deepest thanks to each committee member for their diligent work to fulfill CAGP’s mission.

National Education Committee
Ryan Fraser – Chair
Kathy Arney
Florence Carey
Claude Drouin
Erin Kuhns
Ruth MacKenzie
Paul Nazareth
Jill Nelson
DeWayne Osborn
Michelle M. B. Osborne
Lydia Potocnik
Heather Powers
Sharon Redsky

Government Relations Committee
Amanda Stacey – Chair
Michael Blatchford
Rick Braun-Janzen
Malcolm Burrows
Jenn Button
Terrance Carter
Nicole D’Aoust
Elena Hoffstein
Robert Kleinman
Brenda Lee-Kennedy
Ruth MacKenzie
Susan Manwaring
Janice Loomer Margolis
Margaret Mason
Brenda McEachern
Grant Monck
Elizabeth Moxham
Jill Nelson

Brad Offman
Michelle Osborne
Laily Pirbhai
Heather Powers
Jo-Anne Ryan
Silvia Ugolini
Ross Young

Membership Committee
Carmela Guerriero - Chair
Eli Clarke
Geoff Graham
Landon Jennings
Lara Kinnear
Henrietta Lam
Clare Levy
Paul Nazareth
Jennifer Pederson
National Professional Advisor Council

Lydia Potocnik – Chair
BMO Private Wealth

Jordyn Allan
Miller Thomson LLP

Michel Beauchamp
Beauchamp et Gilbert, notaires inc.

Christine Brunsden
Trusted Legacy

Malcolm Burrows
Scotia Wealth Management

Jennifer Button
RBC Royal Trust

Florence Carey
F I Carey Law Corp

Ryan Fraser
Quiet Legacy Planning Group

Mark Halpem
WEALTHinsurance

Jeremy Hampson
CI Assante

Gordon Holley
Humanity Financial Management Inc.

Ian Hull
Hull & Hull LLP

Candice Jay
Connor, Clark & Lunn

Kurtis Krug
Freedom 55 Financial

Jonathan Lewis
Eastport Financial Group

Bradley Offman
Spire Philanthropy

Jo-Anne Ryan
TD Private Giving Foundation

Amanda Stacey
Miller Thomson LLP

Glenn Stewardson
Assante Hydrostone

Stephen Webb
Entrust Financial Services

Ross Young
ICP Planning
We would also like to recognize and thank these **Funders and Sponsors** for their support in 2022.

- Abundance Canada
- Blackbaud Canada
- Blakely
- BMO Private Wealth
- CAGP Foundation
- CanadaHelps
- Canadian Donor’s Guide
- Cardinal Capital Management
- Carters Professional Corporation
- CFRE
- CI Assante Private Client
- DLA Piper (Canada) LLP
- DonorPerfect Canada
- Environics Analytics
- Fasken Martineau DuMoulin LLP
- Good Works
- KBF Canada
- KPMG Family Office
- Miller Thomson LLP
- Norton Rose Fulbright Canada
- PearTree Canada
- PGrowth
- Private Giving Foundation at TD
- Quiet Legacy Planning Group
- Raymond James Canada Foundation
- RBC Wealth Management – Royal Trust
- Scotia Wealth Management
- The Donor Motivation Program™
- The Foundation (WCPD)
Gratitude Report from the CAGP Foundation

2022 was a big year! We reached a milestone, and the CAGP community warmed our hearts with their confidence and generosity.

The time has flown!
The month of March marked five years since we received our charitable status – and it’s been a game-changer. We’ve been able to achieve so much towards our vision of having a long-term impact on philanthropy in Canada. We are moved by all the support we’ve received since we took our first baby steps.

A great match
As we celebrated our birthday, we focused on giving thanks. We launched the Gratitude Movement, a way to show appreciation to our colleagues and those who’ve inspired us, by making a gift to the CAGP Foundation. Keith Thomson generously offered up to $100,000 to match gifts and pledges, and we were able to reach our goal by December 31st! How did we do it? Through new pledge donors and some great collaboration and teamwork.

You get it!
It should come as no surprise that 58% of our supporters make their gifts through monthly or multi-year pledges. We all know the value of planning and the importance of building sustainability. We are also incredibly honoured to have received three new legacy commitments this year, bringing our total to eleven!

Bottom line
We raised $738,807 in gifts and pledges, and our actual revenue was $523,515. Our endowment at The Winnipeg Foundation now stands at $36,952.

We could not do this without you - our community. Thank you for all that you do to build a better world.

Let’s keep the love going!
"I'm thrilled that the Gratitude Movement has been such a success. These commitments will go a long way to support the Foundation's important work and I'm glad to have had the opportunity to amplify them. Thank you to all our donors - you're making a huge difference!"

– Keith Thomson

"Making monthly donations helps the Foundation and me at the same time. They know that there is a certain amount that they can count on each month and I'm able to spread it out over the year."

– Emelita Ervin

CAGP Foundation Board of Directors

Jill Nelson – Chair
Michelle Osborne – Vice Chair
Andrew Valentine - Secretary
Ninette Bishay - Treasurer
Beth Proven – Past Chair
Barbara Chambers
Grant Monck
Brad Offman
Ricky Piedrahita
Marcella Zanella

Additional Volunteers

Nicola Elkins
Roger Lee
Greg Lichti
Michelle Johnson
Charles O’Neil
Andrea Robertson
Tina Tehranchian
We’re immensely grateful to our family of donors for their loyalty and generosity. The donors in **RED** are our monthly supporters, and those in **BLUE** have multi-year pledges in place. We deeply appreciate their commitment and loyalty.

**Legacy Donors**

- Michelle Johnson
- Ruth MacKenzie
- Chelsea McIntyre
- Paul C.S.C Nazareth
- Jill Nelson
- Charles O’Neil
- Beth Proven
- Doug Puffer
- Keith Thomson
- Gillian Whyte
- Neil Williams

**$500,000 +**

Donald K. Johnson

**$50,000 +**

- Benefaction Foundation
- Power Corporation of Canada
- Keith & Tanja Thomson
- Toronto Foundation

**$25,000 +**

- John Blachford
- **The Conference for Advanced Life Underwriting (CALU)**
- **The Donor Motivation Program**
- Private Giving Foundation
$10,000 +
CIBC Foundation
Elena Hoffstein
DeWayne Osborn
PearTree Canada
Saskatoon Community Foundation
The Jewish Community Foundation of Montreal
Victoria Foundation

$5,000+
Sandra Dow
Jeremy Hampson
South Saskatchewan Community Foundation
Glenn Stewardson
Tina Tehranchian

$2,500+
Nicola Elkins
Grant Monck
Sara Neely
Jill Nelson
Darren & Monika Pries-Klassen
Janine Purves
Ralph & Gay Young Family Capital Fund
Christopher & Alison Richardson
Jasmine Sweatman
Richard Widdifield & Andrea Hannon
Brad Willems & Steve Willems

$1,000+
Rick & Colleen Braun-Janzen
Florence Carey
Carters Law Firm
Kim Cavener
Joan Cosby
Ian Fraser
Geoff C. Graham & James B. Tee
Betty-Anne Howard
Peggy Killeen
Robert A. Kleinman & Alice Herscovitch
Ruth MacKenzie
Paul & Chastity Nazareth
Charles O’Neil

$1,000+ cont’d
Michelle M.B. Osborne
Heather Powers
Beth Proven
Lorna Somers
Amanda Stacey
Jay Stark
Conor Tapp
Silvia Ugolini
Andrew Valentine
Ross B. & Alison Young
Marcella Zanella

$500+
Yolanda Benoit
Michael Blatchford
Joan Blight
Malcolm Burrows
Canada Life
Barbara Chambers
Janice Feuer
Liz Finney
Carmela Guerriero
Janice Loomer Margolis
Susan Manwaring
Jenny Mitchell
Marilyn Monson
Jen Pederson
Ricky Piedrahita
Thomas G. Riglar

$250+
Kathy Arney
Ninette Bishay
Clare Levy
Greg Lichti & Garth Norbraten
Jackie & Kurt Markstrom
Brad Offman
Ligia Peña
Laily Pirbhai
Maurice Prevost
Doug Puffer
Anne Thibodeau
Waterloo Wellington Estate Planning Council
$100+
CAGP Ottawa Chapter
CAGP Vancouver Island Chapter
Doris Cameron
CanadaHelps
Jennifer Chegus
Eli Clarke
Claude Drouin
Estate Planners’ Council of Hamilton
Kim Falconer
Laurie Fox
Daniel Frajman
Ryan Fraser
David Kravinchuk
Michele Krieger
Sam Laprade
Caralen Law
David Love
Gordon Moir
Danzel Pinto

Up to $100
Deborah Bauder
Joel Bray
Jennifer Button
Beth Cairns
Eric Dean
Emelita Ervin
Carolyn Ferguson
Carrie Gemmell
Arundel Gibson
Pat Lilley
Krishan Mehta
Justin Pilon
Ann Rosenfield
Veronique Salibur
Janice St-Denis
Kelly Trickett
Natasha van Bentum
Holly Wagg
Jennifer Walsom
For the year ended December 31, 2022

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<tr>
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<th>Bureau national</th>
<th>Chapitres</th>
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<td>Will Power campaign memberships and sponsorships</td>
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<td>Conference</td>
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<td>Job postings</td>
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<td>Chapter events</td>
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<td>Leave a Legacy and other sponsorships</td>
<td>$19,154</td>
<td>$19,154</td>
<td>$24,370</td>
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<td>Interest and other</td>
<td>$13,480</td>
<td>$13,480</td>
<td>$13,078</td>
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<td>Government assistance</td>
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<td><strong>Total</strong></td>
<td>$854,812</td>
<td>$48,814</td>
<td>$1,017,653</td>
<td>$2,782,300</td>
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<td><strong>EXPENSES</strong></td>
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<td>Will Power campaign</td>
<td>$1,422,680</td>
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<td>$1,422,680</td>
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<tr>
<td>Personnel</td>
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<td>$692,002</td>
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<td>Administration</td>
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<td>$61,400</td>
<td>$29,222</td>
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<td>Professional fees</td>
<td>$111,191</td>
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<td>$36,899</td>
<td>$84,889</td>
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<td>Meals, travel and accommodation</td>
<td>$41,112</td>
<td>$44,391</td>
<td>$85,503</td>
<td>$329</td>
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<td>Fundraising</td>
<td>$69,847</td>
<td>$69,847</td>
<td>$60,501</td>
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<td>Chapter events</td>
<td>$39,387</td>
<td>$39,387</td>
<td>$2,958</td>
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<td></td>
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<tr>
<td>Memberships and honorariums</td>
<td>$10,183</td>
<td>$18,495</td>
<td>$20,678</td>
<td>$19,549</td>
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<tr>
<td>Rent</td>
<td>$10,620</td>
<td>$6,201</td>
<td>$16,821</td>
<td>$35,764</td>
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<tr>
<td>Leave a Legacy</td>
<td>$568</td>
<td>$568</td>
<td>$19,899</td>
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<tr>
<td>Sponsorship</td>
<td>$99,782</td>
<td></td>
<td>$17,360</td>
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<tr>
<td><strong>Total</strong></td>
<td>$1,901,999</td>
<td>$298,085</td>
<td>$1,200,999</td>
<td>$2,241,107</td>
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<tr>
<td><strong>NET REVENUE (EXPENSES) BEFORE INTER-FUND REVENUE AND EXPENSES</strong></td>
<td>$162,841</td>
<td>$62,541</td>
<td>$238,085</td>
<td>$541,193</td>
<td></td>
</tr>
<tr>
<td>Chapter grants</td>
<td>$29,669</td>
<td>$29,669</td>
<td>$12,703</td>
<td>$541,193</td>
<td></td>
</tr>
<tr>
<td>Conference bursaries</td>
<td>$24,413</td>
<td>$24,413</td>
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</tr>
<tr>
<td>Chapter symposium transfer</td>
<td>$16,000</td>
<td>$16,000</td>
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<tr>
<td>Management fee</td>
<td>$99,782</td>
<td>$99,782</td>
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<tr>
<td>Management fee - Will Power campaign</td>
<td>$9,198</td>
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<tr>
<td>Sponsorship</td>
<td>$31,000</td>
<td>$31,000</td>
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<tr>
<td><strong>NET REVENUE (EXPENSES) FOR THE YEAR</strong></td>
<td>$(12,117)</td>
<td>$(63,285)</td>
<td>$88,105</td>
<td>$12,703</td>
<td>$541,193</td>
</tr>
</tbody>
</table>
About Us

Join us in making the world a better place through strategic charitable giving! Join Us.

Our Team

Igor Fernandes  
Communications Coordinator

Laurie Fox  
Director, Will Power Campaign

Nancy Ho  
Manager, Will Power Campaign

Peggy Killeen  
Development Director, CAGP Foundation

Lara Kinnear  
Membership Coordinator

Erin Kuhns  
Manager, Education & Training

Caralen Law  
Conference & Event Planner

Clare Levy  
Director, Strategic Communications & Stakeholder Relations

Ruth MacKenzie  
President & CEO, CAGP Foundation

Susan Murphy  
Communications Consultant

Paul Nazareth  
Vice-President, Education & Development

Jaymie Oakes  
Administrative Assistant, Finance & Donor Relations

Dana Thomson  
Executive Assistant

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1.888.430.9494  info@cagp-acpdp.org