



Impact Report

www.cagp-acpdp.org

2022





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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



A circular graphic with a blue border and a red and white fireworks background. The text "2022 Highlights" is written in white and blue. Three curved lines with dots at the end extend from the circle.

2022 Highlights

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

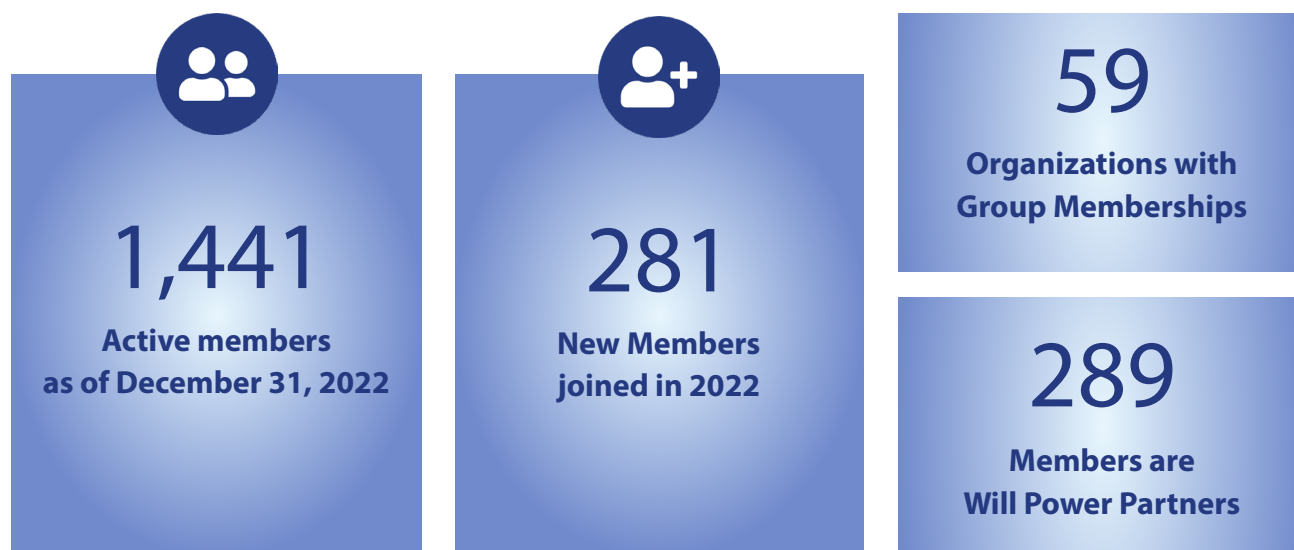


330
—
Delegates



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.



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

WILL POWER™

Support a charity in your Will

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



OUR THANKS

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.

Chapters

Vancouver Island

Beth Cairns – Chair

Alli Cheng
Alyson Dahl
Jineane Eason
Shelley Engelhardt
Greg Kuhn
Jordan McClymont
Cheryl Onciul
Charlotte Paul
Monica Powell
Patrick Smith

Greater Vancouver Area

Kate Bake-Paterson – Chair

Carla Banfield
Nicco Bautista
Celia Campos
Anna du Bois
Moira Gookstetter
Robert Hamanishi
Raman Johal
Aimée Lindenberger
Kris Love
Darya Sawycky
Kerry Shillito
Katherine Smart
Rich Widdifield

BC Interior

Alisa Coquet – Co-Chair

Shelby Lomas – Co-Chair
Sasha Carter
Suzan Goguen
Nena Jovic-Andrejevic

Alberta North

Sonia Egey-Samu – Chair

Jayde Jessome
Randy Liedtke
Kat Mooney
Barb Noble
Christy Soholt
Laura Svajlenko
Terry Tobin
Tracy Zuk

Alberta South

Karen Filbert – Co-Chair

Kaleigh Goehring – Co-Chair
Heather Bach
Whitney Bawel
Heather Berezowski
Susan Deike
Sheelagh Mercier
Neil Williams
Ross Young

Saskatchewan North

Melissa Mann – Chair

Trina Mortson
Jen Pederson
Stacey Schewaga
Jay Stark

Saskatchewan South

Kurtis Krug – Chair

Maureen Harrison
Amy Mohr
Trina Owens
Leanne Posehn
Crystal Schmalte
Kaleta Strain

Manitoba

Florence Carey – Chair

Mia Dunn
Janice Feuer
Pat Lilley
Jackie Markstrom
Rena Molinari
Patrick O'Connor
Beth Proven
Lynda Ruban
Monica Sigurdson
Blair Smith

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 Halpern
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



Our Thanks

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

PGgrowth

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

Our 2022 Donors and Supporters

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





FINANCIALS

For the year ended
December 31, 2022

	Bureau national	Chapitres	Fondation de l'ACPD	Total, 2022	Total, 2021
REVENUE					
Will Power campaign memberships and sponsorships			\$ 1,330,496	\$ 1,330,496	\$ 1,479,052
Donations			\$ 484,685	\$ 484,685	\$ 371,728
Conference	\$ 439,133			\$ 439,133	\$ 308,874
Education courses and designation program	\$ 26,274		\$ 313,903	\$ 340,177	\$ 175,101
Membership fees	\$ 333,335			\$ 333,335	\$ 328,593
Job postings	\$ 42,610			\$ 42,610	\$ 36,490
Chapter events		\$ 24,764		\$ 24,764	\$ 26,661
Leave a Legacy and other sponsorships		\$ 19,154		\$ 19,154	\$ 24,370
Interest and other	\$ 13,460	\$ 4,896		\$ 18,356	\$ 13,078
Government assistance					\$ 18,353
	\$ 854,812	\$ 48,814	\$ 2,129,084	\$ 3,032,710	\$ 2,782,300
EXPENSES					
Will Power campaign			\$ 1,422,680	\$ 1,422,680	\$ 958,870
Personnel	\$ 418,738		\$ 273,264	\$ 692,002	\$ 646,551
Conference	\$ 365,638			\$ 365,638	\$ 231,760
Administration	\$ 60,171	\$ 61,400	\$ 29,222	\$ 150,793	\$ 162,677
Professional fees	\$ 111,191		\$ 36,899	\$ 148,090	\$ 84,889
Meals, travel and accommodation	\$ 41,112		\$ 44,391	\$ 85,503	\$ 329
Fundraising			\$ 69,847	\$ 69,847	\$ 60,501
Chapter events		\$ 39,387		\$ 39,387	\$ 2,958
Memberships and honorariums	\$ 10,183		\$ 18,495	\$ 28,678	\$ 19,549
Rent	\$ 10,620		\$ 6,201	\$ 16,821	\$ 35,764
Leave a Legacy		\$ 568		\$ 568	\$ 19,899
Sponsorship					\$ 17,360
	\$ 1,017,653	\$ 101,355	\$ 1,900,999	\$ 3,020,007	\$ 2,241,107
NET REVENUE (EXPENSES) BEFORE INTER-FUND REVENUE AND EXPENSES					
	\$ (162,841)	\$ (52,541)	\$ 228,085	\$ 12,703	\$ 541,193
Chapter grants	\$ (29,669)	\$ 29,669			
Conference bursaries	\$ 24,413	\$ (24,413)			
Chapter symposium transfer	\$ 16,000	\$ (16,000)			
Management fee	\$ 99,782		\$ (99,782)		
Management fee - Will Power campaign	\$ 9,198		\$ (9,198)		
Sponsorship	\$ 31,000		\$ (31,000)		
NET REVENUE (EXPENSES) FOR THE YEAR	\$ (12,117)	\$ (63,285)	\$ 88,105	\$ 12,703	\$ 541,193

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
Executive Director, CAGP
Foundation

Susan Murphy

Communications Consultant

Paul Nazareth

Vice-President, Education &
Development

Jaymie Oakes

Administrative Assistant, Finance
& Donor Relations

Dana Thomson

Executive Assistant

Canadian Association of Gift Planners

14 Chamberlain Avenue, Suite 201A
Ottawa, Ontario K1S 1V9
1.888.430.9494 info@cagp-acpdp.org

**CAGP**

Impact Report 2022