

2023 Gratitude Report

Remembering Calvin Fong

2023 was marked by the passing of Calvin Fong, our Founding Chair. In 2016, Calvin oversaw our charitable registration and steered us through tasks, discussions and the development of our strategic direction. Calvin's expertise and reputation were exactly what was needed in the Foundation's formative years. He put in an extraordinary amount of time and energy, keeping the big picture in mind while always paying attention to detail. His ethics and integrity were evident in every meeting.

Calvin was commemorated by many members of the gift planning community around the country, including a generous \$10,000 gift from his employer, the Vancouver Foundation, in memory of their cherished colleague.

Our 2023 Gratitude report is presented in honour of Calvin, through the broad themes of leadership, loyalty, sustainability and legacy.



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"Change and progress cannot be achieved alone. The best results are always a product of collaboration, consultation and partnership."

Calvin Fong, at the launch of the CAGP Foundation in 2017



Leadership



“

I am inspired by the meaningful work that CAGP and the CAGP Foundation does supporting education, networking and advocating for change at the government level. They are superheroes in the quest for an equitable and better world.”

Carmela Guerriero, annual donor

Education

Education is still the cornerstone of the CAGP Foundation and our raison d'être, which we provide both in-person and online. Our signature courses remain popular and we've added several new ones, including a **Gift Planning Fundamentals for Professional Advisors** and a course in **Bequest Administration Essentials**. We now offer the **Webinar Wednesday** series and the **Gift Planning Fundamentals** in French.



In 2023 we released our report on important research we undertook in partnership with KCI Philanthropy: **Influence, Affluence and Opportunity: Donor-Advised Funds in Canada.** 

Will Power



The Will Power campaign continues to be an innovative and growing initiative with over 550 partners enrolled from around the country in 2023. We are honoured to be supported by generous funders including the [Victoria Foundation](#), [Toronto Foundation](#) and the [Saskatoon Community Foundation](#), as well as [Power Corporation of Canada](#) and [The Conference for Advanced Life Underwriting \(CALU\)](#).

The statistics demonstrating the campaign's impact after just three years are astonishing:



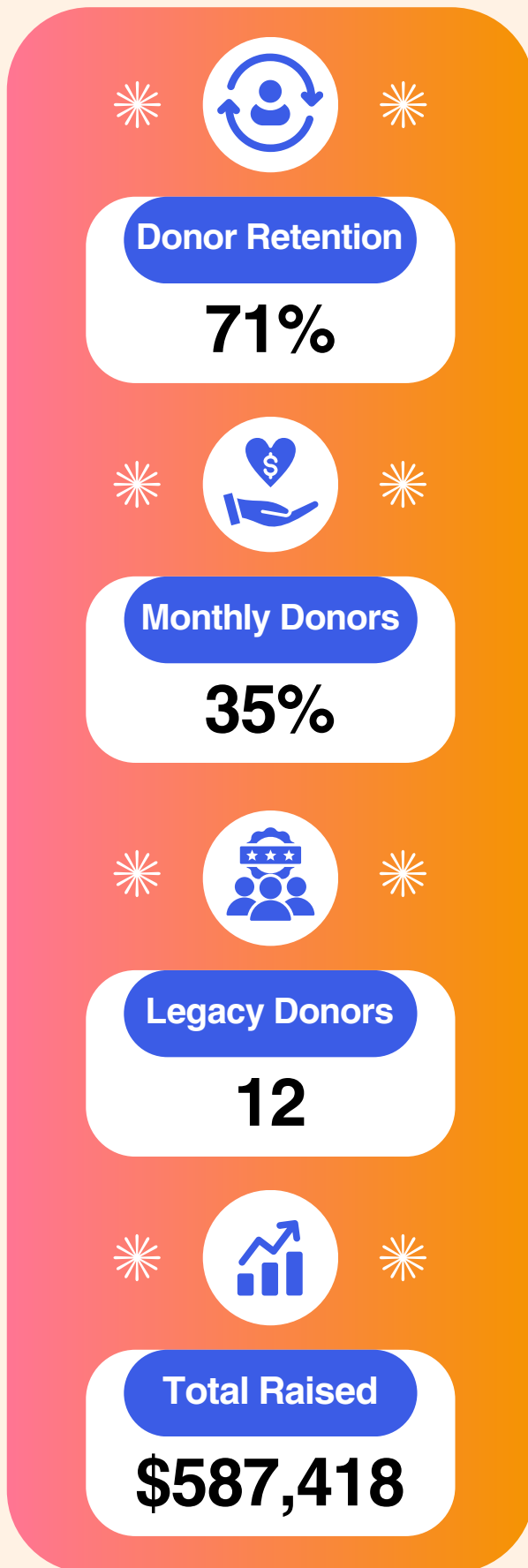
2.7 million

CANADIANS ARE NOW
CONSIDERING **LEAVING A GIFT
TO CHARITY IN THEIR WILL**



5% → 8%

OF CANADIANS HAVE **LEFT
A GIFT TO CHARITY** IN THEIR WILL,
A **3% INCREASE** FROM 2020



Loyalty

We are proud to continue our tradition of exemplary donor retention. **At 71% our donor retention rate is 26% higher than the sector average.** An amazing **one third of our donors** give through monthly gifts.

Sustainability

We are steadfastly supported by many multi-year pledge donors. We are particularly grateful to **Keith and Tanja Thomson**, **Donald K. Johnson** and **Benefaction Foundation** for continuing to believe in the importance of our work.

Legacy

We are incredibly proud to have **increased our number of legacy donors to 12.** We are honoured to have been made part of your life stories. You are an inspiration to us all.

The Figures

We raised **\$587,418** in gifts and pledges and our actual revenue was **\$566,933.** Our endowment at The Winnipeg Foundation now stands at **\$37,026.**

Your support **inspires us!**



You're an integral part of the reason we exist and we value your commitment to building a better world through strategic charitable giving. Please take a moment to view this [quick message](#)  about the impact that the CAGP Foundation has had on just one person's professional life.

Our 2023 **donors and supporters**

This year we've decided to highlight the themes in [this report](#) , while striving to be more equitable in our recognition practices. We've alphabetically listed our donors in the categories of Annual, Monthly, Multi-Year Pledges and Legacy.

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Thank You For Your Support!



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