

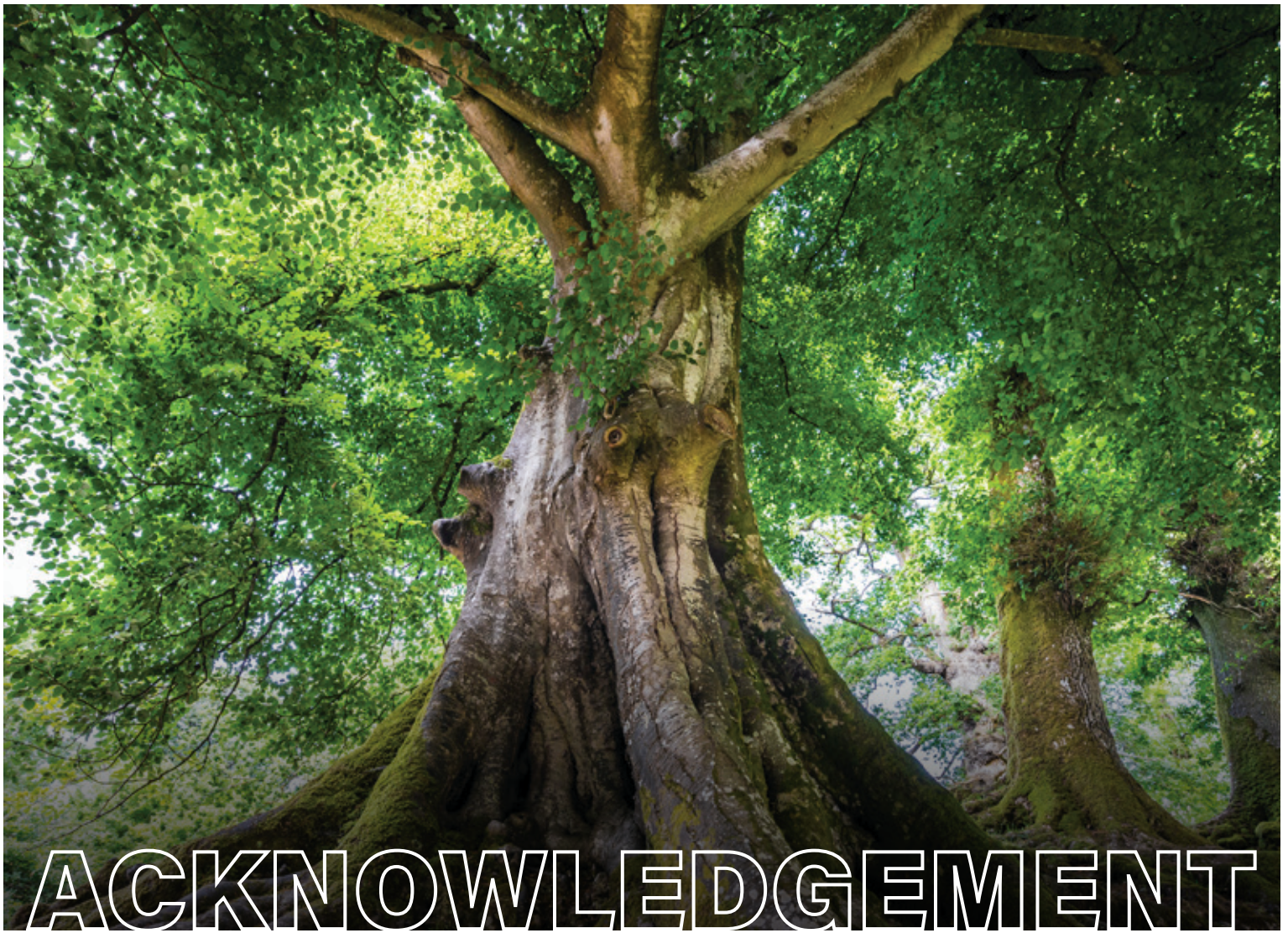


2025

IMPACT REPORT



CAGP



ACKNOWLEDGEMENT

LAND ACKNOWLEDGEMENT

Our staff, operations, work, and network depend on traditional Indigenous territories to provide us physical space, sustenance, safety, and community to work, live, and play.

Our physical office is located in Ottawa, on the unceded, unsundered Territory of the Anishinaabe Algonquin Nation whose presence here reaches back to time immemorial. We recognize the Algonquins as the customary keepers and defenders of the Ottawa River Watershed and its tributaries. We acknowledge that our ability to live and work on these lands today is a

direct benefit of policies of expulsion and assimilation of Indigenous peoples during the time of settlement and Confederation, and since. The harms of these policies are many and are still being felt in Indigenous communities today. We express gratitude towards the Indigenous peoples who have and will continue to steward these lands. We commit to amplifying the voices of Indigenous peoples and working against the everyday forces of white supremacy and colonialism present in the nonprofit sector.

LEADERSHIP MESSAGE



Serena Hak
Chair of the
Board of Directors



Ruth MacKenzie
President & CEO,
CAGP / Executive Director,
CAGP Foundation

This year marked the beginning of an important new chapter for CAGP, one shaped not only by a new strategic plan, but by the strength and leadership of our community.

With the launch of our [2025–2029 Strategic Plan](#), we reaffirmed our commitment to advancing professional excellence in charitable gift planning and to expanding equitable access to this work across Canada. Our vision of a more generous and just society depends on strong, informed leadership within the sector.

Every day, CAGP strives to influence the future of philanthropy: supporting and educating fundraisers and professional advisors to thoughtfully guide donors and clients on how to have greater impact by giving in a more thoughtful, strategic way, now and into the future; shaping public policy; and elevating standards of practice.

In 2025, we saw that leadership in action, in our courses, at the national conference, in research initiatives, through raising awareness of the possibilities for legacy through a gift in a Will, and through meaningful advocacy on behalf of the charitable sector.

We feel immense gratitude for the people behind that momentum: members who bring diverse expertise and an abiding commitment to excellence; volunteers whose time and energy elevate our work; partners whose support expands our reach; and our dedicated

TOGETHER, WE ARE SHAPING A MORE GENEROUS AND JUST SOCIETY.

staff whose passion makes results possible. Your engagement fuels the ideas, growth, and impact reflected throughout this report.

We are equally grateful to the donors and supporters of the CAGP Foundation, whose generosity fuels research, education, and thought leadership that benefit the entire profession. Their investment ensures that our CAGP community remains a trusted national voice and a catalyst for innovation in strategic charitable giving.

As stewards of this organization, the CAGP Board has also focused on strengthening our foundation by enhancing governance, embedding diversity, equity, and inclusion in our structures, and ensuring long-term sustainability.

These commitments reflect our responsibility to our members and to the sector we serve.

We are proud of the momentum reflected in this report, and deeply grateful for the professional leadership and generosity that make it possible.

Together, we are shaping a more generous and just society.

– Serena and Ruth

WITH THANKS TO THE CAGP BOARD OF DIRECTORS

Serena Hak
Chair

Kathy Arney
Vice Chair

Geoff Graham CFRE
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Véronique Salibur
Secretary

Danzel Pinto
Treasurer

Maya Ahmad
Kate Bake-Paterson

Janice Correa
Christine Kang
Claude Lestage
Jen Pederson

We are grateful to Michael Blatchford who completed his time on the Board in 2025.



SPOTLIGHT

DIVERSITY, EQUITY, AND INCLUSION SPOTLIGHT

In 2025, with the launch of our new strategic plan the Board’s Diversity, Equity, and Inclusion (DEI) Working Group, established in 2024, was officially reframed as a new standing committee of the Board, with an aim of building a DEI framework to integrate throughout CAGP.

We are **committed** to fostering a culture of diversity, equity, and inclusion (DEI) across all aspects of our work, an ongoing process, and not one that we can ‘fix’

with one strategy document. However, in 2025, we took very meaningful steps to embed DEI principles into our organization, and with the lens of the broader gift planning community in mind.

To guide this incredibly important work, we established both a Committee of the Board and a staff working group dedicated to advancing DEI initiatives from both a governance and operational perspective. The Board also engaged a DEI consultant to provide expert guidance and ensure our efforts are strategic and impactful.

DIVERSITY, EQUITY, AND INCLUSION SPOTLIGHT

Additionally, we provided a full day of DEI training for our Chapter Chairs, equipping them with tools and insights to champion these values within their local communities. Some Chapters have taken this a step further by creating DEI roles to deepen their commitment at the grassroots level.

We are also proud to honour and respect the knowledge and contributions of Elders from Indigenous communities. As part of this commitment, we ensure Elders are compensated for their time and expertise when they choose to join us to set the tone for our National Conference.

Furthermore, we actively seek to work with suppliers from equity-seeking communities whenever possible, recognizing the importance of supporting diverse businesses and fostering inclusive economic opportunities.

Our commitment to diversity, equity, and inclusion is at the heart of our vision of a more generous and just society. These values are not merely aspirations, they are fundamental principles that guide our work. We are dedicated to fostering an environment

where everyone feels valued, respected, heard, and empowered to drive meaningful change. We also recognize the ongoing impacts of operating within a white settler colonial framework, which has caused and continues to perpetuate harm to Indigenous peoples, as well as racialized and marginalized communities. This awareness strengthens our resolve to work collaboratively towards reconciliation and equity in all

that we do. Progress requires courage and risk, that includes getting things wrong at times. We see mistakes not as failures, but as opportunities to hear more voices and deepen our understanding.

OUR COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION IS AT THE HEART OF OUR VISION OF A MORE GENEROUS AND JUST SOCIETY.

DEI COMMITTEE OF THE BOARD

Maya Ahmad – Chair
Kathy Arney

Janice Correa
Serena Hak

Ruth MacKenzie
Véronique Salibur

DEI STAFF WORKING GROUP

Nancy Ho
Lara Kinnear

Clare Levy
Ruth MacKenzie

Tara Sandler
Dana Thomson



FOUNDATIONS

STRATEGIC FOUNDATIONS

CAGP is embarking on a bold new chapter with its 2025–2029 Strategic Plan, building on the successes, and learning from the 2019–2023 plan.

At its heart is a refreshed mission: to expand resources for causes and communities by educating, advocating, and breaking down barriers to equitable access in charitable gift planning.

The vision is ambitious and inspiring – **to create a more generous and just society**. This plan prioritizes inclusivity, aiming to bring the transformative power of philanthropy to underserved communities across Canada. It focuses on expanding awareness of gift planning as an essential fundraising strategy,

amplifying public engagement through the impactful Will Power campaign, and reinforcing CAGP’s position as the leading educational authority in gift planning.

CAGP is also committed to ensuring long-term sustainability by investing in governance, fostering diversity, and empowering its chapters nationwide. This strategic plan is a **call to action**, reflecting CAGP’s unwavering dedication to shaping a future where **generosity fuels justice and equity for all**.

Later in this report you will find details on the start we have made on this journey towards a more generous and just society.

EXPANDING THE GIFT PLANNING COMMUNITY

In 2025, the National Membership Committee partnered with local Membership Chairs to focus on outreach to smaller charities and organizations with fundraisers new to the role.

Together, we highlighted the accessibility of our Small Charity Organization Membership and the New Fundraiser Membership, emphasizing how these options make it easier for underrepresented groups

Of the 298 new members, we welcomed:



and marginalized communities to engage with and benefit from CAGP’s resources and network.

Thanks to these efforts, our membership grew to 1,423 members by December 2025, with an impressive 298 new members joining this year alone. This growth reflects our commitment to fostering inclusivity and expanding access to the tools and connections needed to strengthen the gift planning sector.

While we are proud of this growth, we also recognize some challenges, with a retention rate of 74% in 2025. The largest decrease was seen among Will Power partners. This highlights an opportunity for us to continue evolving our offerings and outreach to ensure we’re meeting the needs of all members.

As we look ahead, we remain committed to fostering a vibrant, inclusive, and supportive membership community that empowers professionals and organizations to inspire strategic charitable giving across Canada.

We expanded our reach, welcoming new members from a diverse range of sectors, including:



MEMBERSHIP COMMITTEE

Jen Pederson – Chair
Igor Fernandes
Christine Kang
Lara Kinnear
Emma Kirkland
Henrietta Lam

Clare Levy
Terri Mann
Sarah Morkin
Tara Sandler
Laura Svajlenko

RAISE PUBLIC AWARENESS



Will Power: Shifting How Canadians Think About Legacy Giving

In 2020, the [CAGP Foundation](#) launched [Will Power](#) – a national public awareness campaign designed to normalize the act of leaving a charitable gift in your Will. The campaign is supported by a collective of over 500 charity partners, financial advisors, and legal professionals, and built on a straightforward premise: Canadians can support the causes they care about through their estate, without compromising what they leave to family.

Polling conducted by Nanos Research at the campaign's launch in 2020 and again in 2025 has tracked a significant shift in Canadian attitudes and behaviour around legacy giving:



How do we know Will Power is contributing to this shift?

The 2025 research provides direct evidence. One in four Canadians is now aware of the Will Power campaign and following it, and 4.4 million say they are considering a gift in their Will specifically because of it.

Importantly, legacy gifts represent net new funding for the charitable sector – they complement rather than replace annual donations, creating greater long-term financial stability for organizations across the country. The Will Power collective is growing the pie, building a sustained source of support for the sector for years to come.

The research also reveals notable generational and demographic trends. Younger Canadians are following the campaign in significant numbers, and Millennials are now more likely than Boomers to report having already left a gift in their Will. Interest in legacy giving is also higher than average among Black, South Asian, Asian, and immigrant Canadians – indicating that the campaign is resonating across a broad and diverse cross-section of the population.



EDUCATIONAL LEADERSHIP & EXPERTISE

Awarding Excellence

In 2025, we were delighted to honour Keith Thomson with a Lifetime Achievement Award in recognition of all he has contributed to strategic philanthropy in Canada.

We also recognized Nicola Elkins and Candice Jay as “Friends of CAGP” for their contribution and dedication to the mission of CAGP.



KEITH THOMSON
Lifetime Achievement
Award



NICOLA ELKINS
Friend of CAGP



CANDICE JAY
Friend of CAGP

EDUCATIONAL LEADERSHIP & EXPERTISE

Education

In June 2025, the CAGP Education Committee gathered in Winnipeg for an insightful and collaborative retreat. This dedicated team of professionals came together to discuss a wide range of education-related topics, ensuring that our programs remain relevant, impactful, and aligned with the needs of the gift planning sector. As part of this retreat, the committee took the opportunity to update key course materials, reinforcing our commitment to delivering high-quality education.

We were also thrilled to welcome Lisa Dayanandan as a new faculty member for Gift Planning Fundamentals and Yolanda Benoit for Bequest Administration Essentials. Their expertise and passion for gift planning education has undoubtedly enriched the learning experiences for our participants.

EDUCATION COMMITTEE

Florence Carey – Chair	Erin Kuhns	Michelle Osborne
Kathy Arney	Claude Lestage	Tara Sandler
Claude Drouin	Ruth MacKenzie	Kerry Shillito
Ryan Fraser	Riz Nathoo	
Sherri Grosz	DeWayne Osborn	

Our reach and impact this year have been remarkable. Across our educational offerings, we saw:



Research publications

In 2023, CAGP established a Donor Advised Fund (DAF) Working Group as a forum for those interested in discussing, increasing access, and facilitating more support for Canada’s charities through DAFs. In 2025, with support from the CAGP Foundation, the Group published a significant suite of resources—five practical publications that bring clarity to one of the

fastest-growing areas of charitable giving in Canada. Together, they explore how DAFs operate, their governance, and their impact on donors, advisors, foundations, and charities.

DONOR ADVISED FUND WORKING GROUP

Malcolm Burrows – Co-Chair Nicola Elkins – Co-Chair

EDUCATIONAL LEADERSHIP & EXPERTISE

The National Conference

The 2025 National Conference in Edmonton was a resounding success, bringing together 468 delegates, our largest gathering in recent years, to exchange ideas, foster collaboration, and advance the field of strategic giving. This flagship event continues to be a cornerstone of the CAGP experience, offering unparalleled opportunities for learning, networking, and inspiration.

Opening Ceremony

The conference began with a moving and meaningful opening by Elder Valerie Wood, setting the tone for a gathering grounded in respect, reflection, and shared purpose. Among the many highlights, Russell James proved to be a major draw, captivating attendees with his insights and expertise in strategic charitable giving.

New This Year

In response to delegate feedback from previous years, we also introduced new elements to enhance the conference experience. Thursday afternoon featured dedicated “free time” for delegates to decompress, a chance to recharge and reflect amidst a busy schedule, while we offered yoga, and speaker training for those who like to keep busy.

Additionally, we launched a Friday morning networking breakfast, which was met with great enthusiasm and provided a relaxed environment for

participants to connect and share ideas before the final sessions. This was the second year we offered a “quiet room” for delegates, and it quickly became a valued space for reflection, prayer, or simply escaping from the business of the day. Its frequent use underscored the importance of creating inclusive and supportive environments for all delegates.

Equity Access

In 2025, we continued to prioritize efforts to expand who can participate in our National Conference, not only to broaden our network but to ensure delegates benefited from a wider array of voices, speakers, and perspectives. Through our Equity Access Bursaries, we supported individuals from underrepresented and equity-seeking communities, helping to remove financial barriers and ensuring that more people could participate in the learning and connecting on offer. Additionally, we remained committed to compensating our speakers fairly and providing travel support if needed, recognizing the value of their time, expertise, and lived experiences. These efforts were part of our broader commitment to fostering a more inclusive space for learning, collaboration, and connection. By bringing together diverse perspectives, we ensured that our National Conference was a place where all voices were heard, and where delegates left inspired and equipped to make a meaningful impact in their communities.

LONG-TERM SUSTAINABILITY

In service to our members and as stewards of the organization, the CAGP Board of Directors puts continual attention to its own practices and infrastructure.

Following a substantial undertaking, in 2025 the Board approved updated governance and financial management policies. CAGP’s fiscal health is also always front of mind as the Board ensures proper financial oversight processes are in place and sets aims for fiscal reserves to ensure the organization is in a position to weather storms or unanticipated incidents.

The Board’s excitement over launching a new Strategic Plan was palpable, but the Board also recognizes that the Plan isn’t a status document, but a living, breathing roadmap for the next few years. Even though it was just the first year of the plan, the Board took time in late 2025 for an annual Strategic Plan review, to reflect on successes and lessons learned over the last year, and to recalibrate where necessary. This included significant attention to DEI, currently identified in the fourth pillar of Plan. The Board’s and CEO’s commitment is to ensure DEI is embedded across all facets of the plan and in CAGP’s governance, and across programs and operations. You can read more about our DEI work in the coming pages.

Government Relations

In 2025, we amplified our voice on behalf of Canada’s charitable sector by writing to federal decision-makers with key strategies to strengthen the sector and support its vital work. We advocated for structured consultation between the government and the charitable community, emphasizing the importance of collaboration to address pressing challenges.

Our recommendations included practical legislative and tax reforms to reduce barriers to charitable giving. These included proposed changes to withholding tax rules, Alternative Minimum Tax provisions, anti-directed giving regulations, and the capital gains treatment on gifts of private shares and real estate. These reforms aimed to empower charities to better meet the growing demand for their services.

Additionally, we strongly urged the government to uphold the “advancement of religion” as a recognized charitable purpose, ensuring that this essential aspect of Canada’s charitable framework remains protected.

Through these efforts, we reinforced our commitment to advocating for policies that enable and inspire philanthropy, ultimately strengthening the capacity of charities to create meaningful change in communities across the country.

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Jennifer Button

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Terrance Carter

Kaela Crowhurst

Nicola Elkins

Mark Goldbloom

M. Elena Hoffstein

Robert Kleinman

Kate Lazier

Ruth MacKenzie

Susan Manwaring

Margaret Mason KC

Brenda McEachern

Grant Monck

Liz Moxham

Jill Nelson

Brad Offman

Michelle Osborne

Jennifer Pederson

Heather Powers

Christopher Richardson

Jo-Anne Ryan

Amanda Stacey

Silvia Ugolini

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Geoff Graham
Kathryn Levandier
Terri Mann
Kayleigh Perkins
Emily Smith
Celina Stoyles
Karen Theriault

GRATITUDE REPORT FROM THE CAGP FOUNDATION



A Ripple Effect

At the CAGP Foundation, we believe that when people gain knowledge and share it, the impact spreads far beyond the moment of learning. Thanks to the generosity of our donors and supporters, that ripple effect continues to grow.

When professionals take part in our courses and webinars, read our research, or engage with initiatives like the Will Power campaign, they don't keep that knowledge to themselves. They bring it back to their organizations and communities. They share ideas with colleagues, strengthen their fundraising practices, and help donors and clients realize their philanthropic goals. They help charities across Canada do more for the communities they serve.

From Learning to Lasting Impact

Each program, conversation, and connection helps build stronger skills and greater confidence in strategic charitable gift planning. Over time, this shared learning strengthens the entire charitable sector and helps ensure that generosity continues to thrive.

Powered by Community

One of the most inspiring things about the Foundation is the community behind it. Many of the volunteers and faculty who give their time and expertise are also our donors, and they support us in so many ways. They contribute through their time, talent, treasure, and ties, all with a shared goal: building a strong and connected community and investing in the future of charitable giving in Canada.

Our Results

We raised **\$472,882** and our actual revenue was \$462,137 in 2025. Our endowment at The Winnipeg Foundation stands at \$43,864. Our monthly donors now account for 39% of our supporters and our list of legacy donors continues to grow.

OUR BOARD

Amanda Stacey – Chair
Ricky Piedrahita – Vice Chair
Liz Finney – Secretary
Ninette Bishay – Treasurer

Roger Lee
Jaya Mootoo
Jill Nelson

We are grateful to Barbara Chambers, Grant Monck, Brad Offman, and Michelle Osborne who completed their time on the Board in 2025.

DONORS & SUPPORTERS

Legacy Donors

James Dunne
Berna Gülmisâl
Serena Hak
Betty-Anne Howard
Michelle Johnson
Ruth MacKenzie
Chelsea McIntyre
Paul C.S.C. Nazareth
Jill Nelson
Charles O'Neil
Beth Proven
Doug Puffer
Keith Thomson
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Gillian Whyte
Neil Williams

Pledge Donors

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Jackie Markstrom
Margaret Mason KC
Charles O'Neil
Darren & Monika Pries-Klassen
Christopher & Alison Richardson
Saskatoon Community
Foundation
Keith & Tanja Thomson
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Monthly Donors

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Kathy Arney
Deborah Bauder
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Peter Bennett
Ninette Bishay
Michael Blatchford
Joel Bray
Beth Cairns
Kim Cavener
Barbara Chambers
Jennifer Chegus
Eli Clarke
Colleen Cowman
Megan Doyle Ray
James Dunne
Emelita Ervin
Leah Eustace
Jeff Evans
Liz Finney
Nadine Fowler
Carrie Gemmell
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Maureen Harrison
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David Love
Susan Manwaring
Gordon Moir
Paul & Chastity Nazareth
Jill Nelson
Gwen Noble
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Ricky Piedrahita
Justin Pilon
Abby Pond
Heather Powers
Maurice Prevost
Beth Proven
Doug Puffer
Véronique Salibur
Kerry Shillito
Amanda Stacey
Anne Thibodeau

“CAGP and I started this work in strategic gift planning at about the same time. It has been my educational and professional partner along the way, exploring how to build a better world through philanthropy. I have met a network of incredibly bright and caring people. Supporting the educational initiatives for this network, and for our communities, is a natural fit through the CAGP Foundation. The bonus of supporting the Will Power campaign through my donation continues the legacy that grounds my daily work.”

– Sara Neely

DONORS & SUPPORTERS

Andrew Valentine
Jennifer Walsom
Ross B. & Alison Young

Annual Donors

Cam Anderson
Aqueduct Foundation
Ryan Armstrong
Kate Bake-Paterson
Nicole Bedard
Yolanda Benoit
John Blachford
Joan Blight
Julie Brown
Malcolm Burrows
Theresa Butler-Porter
CAGP Alberta North Chapter
CAGP Manitoba Chapter
Doris Cameron
Florence Carey
Michele Chiasson-Suart
CIBC Private Wealth
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Kim Falconer
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Candice Jay
Neha Jayaram
Christine Kang
Peggy Killeen
Lara Kinnear
Robert A. Kleinman & Alice Herscovitch
Sarah Kreplin
Richard Lefebvre
Claude Lestage

Ruth MacKenzie
Danièle Mackinnon
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Melissa Margles
Jackie Markstrom
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Jackie Mersereau
Haleema Mini
Jenny Mitchell
Grant Monck
Marilyn Monson
Julie Muir
Myriad Canada
Sara Neely
Janice O'Dette
Jaymie Oakes
Brandon Porter
Janine Purves
Ralph & Gay Young Family
Capital Fund
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Eric Saarvala
Tara Sandler
Lauren Stamhuis

Charlene Taylor
Linda Tchombé
Private Giving Foundation
Tina Tehranchian
Dana Thomson
Kelly Trickett
Richard Widdifield & Andrea Hannon
and two donors who chose to remain anonymous

Sponsors

DonorPerfect
PearTree Canada

**A huge thank you to our donors – your support helps
knowledge spread, communities grow stronger, and
generosity reach further!**

FINANCIALS

	National Office	Chapters	CAGP Foundation	Total 2025	Total 2024
REVENUE					
Will Power campaign memberships and sponsorships	\$ –	\$ –	\$ 973,327	\$ 973,327	\$ 1,022,471
Conference	727,411	–	–	727,411	636,485
Membership fees	424,862	–	–	424,862	409,688
Donations	–	–	375,700	375,700	352,450
Education courses and designation program	56,939	–	296,660	353,599	329,082
Interest and other	23,317	7,332	27,081	57,730	81,032
Chapter events	–	45,622	–	45,622	26,696
Job postings	42,700	–	–	42,700	30,350
Leave a Legacy and other sponsorships	–	34,295	–	34,295	44,747
	1,275,229	87,249	1,672,768	3,035,246	2,933,001
EXPENSES					
Will Power campaign	–	–	1,289,754	1,289,754	1,051,515
Personnel	547,881	–	288,181	836,062	718,591
Conference	447,065	–	–	447,065	496,207
Professional fees	134,420	–	51,846	186,266	207,778
Administration	75,863	40,651	36,164	152,678	128,206
Meals, travel and accommodation	51,557	–	95,294	146,851	85,027
Fundraising	–	–	80,291	80,291	74,390
Memberships and honorariums	12,939	–	34,000	46,939	28,063
Chapter events	–	36,004	–	36,004	41,041
Rent	9,861	–	6,802	16,663	17,997
Leave a Legacy	–	4,234	–	4,234	4,614
Website impairment loss	–	–	–	–	117,982
	1,279,586	80,979	1,882,332	3,242,897	2,971,411
NET REVENUE (EXPENSES) BEFORE INTER-FUND REVENUE AND EXPENSES	(4,357)	6,270	(209,564)	(207,651)	(38,410)
Conference bursaries	28,557	(25,057)	(3,500)	–	–
Chapter grants	(44,920)	44,920	–	–	–
Chapter symposium transfer	16,125	(16,125)	–	–	–
Management fee	192,081	–	(192,081)	–	–
Management fee - Will Power	16,557	–	(16,557)	–	–
Project administration fee	7,000	–	(7,000)	–	–
Sponsorship	1,500	(1,500)	–	–	–
NET REVENUE (EXPENSES) FOR THE YEAR	\$ 212,543	\$ 8,508	\$ (428,702)	\$ (207,651)	\$ (38,410)



PEOPLE

OUR PEOPLE

Igor Fernandes

Digital Communications Specialist

Laurie Fox

Campaign Director, Will Power

Nancy Ho

Campaign Manager, Will Power

Peggy Killeen

Development Director, CAGP Foundation

Lara Kinnear

Manager, Membership

Erin Kuhns

Manager, Education & Training

Caralen Law

Conference & Event Planner

Clare Levy

Director, Strategic Communications & Network Engagement

Ruth MacKenzie

President & CEO, CAGP / Executive Director, CAGP Foundation

Jaymie Oakes

Administrative Assistant, Finance & Donor Relations

Tara Sandler

Vice President, Education & Partnerships

Vikrant Singh

Digital Marketing Manager, Will Power

Dana Thomson

Executive Assistant