



**GREATER VANCOUVER CHAPTER
MENTOR APPLICATION FORM**

*Thank you for your participation in the CAGP Vancouver Chapter Mentorship Program.
Please complete the following questionnaire to help us better pair you with one of our Learning Partners.
E-mail the completed form to TLusher@genuscap.com*

Name: _____

Employer: _____

Position: _____

Contact Info*: ☐ Phone: _____ ☐ Email: _____

* Please indicate preference with a check mark if applicable

1. Are you a member in good standing with CAGP? Yes ☐ No ☐

Please note: If you are not a member you may not join the program as mentor

2. How long have you been a CAGP member for?

- ☐ 3-5 years
- ☐ 5-10 years
- ☐ more than 10 years

3. Please indicate the number of years you have been employed in the Planned Giving sector:

- ☐ 3-5 years
- ☐ 5-10 years
- ☐ more than 10 years

4. Please indicate how long you have been employed with your present employer:

- ☐ less than 3 years
- ☐ 3-5 years
- ☐ 5-10 years
- ☐ more than 10 years

5. Do you feel best suitable to mentor a Learning Partner from an organization with fundraising staff of

- ☐ 3 or less ☐ Not sure
- ☐ 4 – 9
- ☐ 10+

6. Please indicate any professional designation(s) such as a CFRE:

7. In which industries have you worked as a Planned Giving professional?

Charity

- | | |
|--|--|
| ☐ Animal Protection & Welfare | ☐ Health & Wellness |
| ☐ Community services | ☐ Health Research |
| ☐ Culture & Recreation | ☐ International Development |
| ☐ Education & Job Training | ☐ Law & Legal Support |
| ☐ Environment & Conservation | ☐ Poverty Alleviation |
| ☐ Family & Senior Support | ☐ Youth Services |

Professional Advisor

- | | |
|--|--|
| ☐ Legal Advisor | ☐ Insurance Advisor |
| ☐ Financial Planner | |
| ☐ Other _____ | |

8. Please indicate what Planned Giving Courses you have taken:

- ☐ The Original Gift Planning Course
- ☐ Advanced Canadian Gift Planning Symposium
- ☐ BCIT Fundraising Course
- ☐ Other: _____

9. Referring to the [CAGP Competency Framework](#), please indicate in which areas are you best suited to mentor:

- ☐ Relationship Building
- ☐ Ethics & Judgement
- ☐ Knowledge of Gift Planning Vehicles
- ☐ Knowledge of a charity's framework (policies and procedures, management & governance etc.)
- ☐ Knowledge of Legal Context of Gift Planning & the Charitable Sector
- ☐ Knowledge of Marketing & Communications

10. Please tell us about the reason(s) for wanting to serve as a Mentor:

11. Any Other Comments

SUBMIT

THANK YOU

We look forward to matching you with a Learning Partner and seeing you at future CAGP events. Don't forget to subscribe to our newsletter [here](#).