



CAGP Montreal Chapter Mentorship Program
Application Form to be a Learning Partner

Please complete the following questionnaire, which will help match you with a volunteer Mentor, and send it to acpdp.cagp.mtl@gmail.com. Thank you for your interest in our program.

Name: _____

Employer: _____

Position: _____

Work phone number: _____ Cell: _____

Email: _____

1) Are you a member in good standing with CAGP? Yes: _____ No: _____

2) How many years have you been working in the Planned Giving Sector: _____

3) What percentage of your work is exclusively devoted to planned giving per week: _____%

4) How many years have you been working for your current employer: _____

5) Do you have one or more professional designations (CFRE or others): _____

Which ones: _____

6) Have you ever attended Planned Giving Courses: _____

7) In which sectors do you need guidance?

- Taxation
- Bequest and estate administration
- Life insurance / charitable annuity
- Donor relationship development
- Planned giving marketing and communications
- Strategic Planning
- Reporting to a board of directors
- Career plan and personal development
- Other: _____



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Application Form to be a Mentor

Please complete the following questionnaire, which will help match you with a Learning Partner, and send it to acpdp.cagp.mtl@gmail.com. Thank you for your interest in our program.

Name: _____

Employer: _____

Position: _____

Work phone number: _____ Cell: _____

Email: _____

1) Are you a member in good standing with CAGP? Yes: _____ No: _____

2) How many years have you been working in the Planned Giving Sector: _____

3) How many years have you been working for your current employer: _____

4) Do you have one or more professional designations (CFRE or others)? _____

Which ones: _____

5) What are your areas of professional expertise?

- Taxation
- Bequest and estate administration
- Donor relationship development
- Planned giving communications and marketing
- Implementation of a planned giving program
- Prospect Research
- Stewardship and recognition program
- Governance
- Life insurance / charitable annuity
- Wealth Management
- Estate and Trust Law
- Other: _____