

# CAGP

CAGP Montreal Chapter Mentorship Program  
**Application Form to be a Mentor**

Please complete the following questionnaire, which will help match you with a Learning Partner, and send it to Ms. Annick Delestre at [acdp.cagp.mtl@gmail.com](mailto:acdp.cagp.mtl@gmail.com). Thank you for your interest in our program.

Name: \_\_\_\_\_

Employer: \_\_\_\_\_

Position: \_\_\_\_\_

Work phone number: \_\_\_\_\_

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):  
\_\_\_\_\_

5) What are your areas of professional expertise:

Taxation

Bequest and estate administration

Donor relationship development

Planned giving communication 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: \_\_\_\_\_

# CAGP

## 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 Ms. Annick Delestre at [acdpd.cagp.mtl@gmail.com](mailto:acdpd.cagp.mtl@gmail.com). Thank you for your interest in our program.

Name: \_\_\_\_\_

Employer: \_\_\_\_\_

Position: \_\_\_\_\_

Work phone number: \_\_\_\_\_

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):  
\_\_\_\_\_

5) Have you ever attended Planned Giving Courses: \_\_\_\_\_

6) 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: \_\_\_\_\_