LEADERSHIP MESSAGE

We began 2021 with vaccinations becoming available and the proverbial light at the end of the tunnel shining.

Back then, we couldn’t imagine that we’d be, for a second time, sharing a reflection on a year that continued to be laden with uncertainty and disruption. Nevertheless, it was also one filled with achievement and accomplishment, which leads us to report upon a tremendously successful year.

While a virtual conference was not our first choice, the staff team and volunteer leadership curated content and carefully considered details of an online conference in order to live up to our established reputation of an event with first-class learning and meaningful networking, along with ideas and inspiration. Delegates showed up in considerable numbers, as much because the CAGP family is a communal group that yearns to connect, as they wanted to show their support for their association during a challenging time. We were moved, and many told us the Conference was among the best in the virtual world that they had attended.

Our cornerstone offering of strategic philanthropic education continued to move forward virtually, and new programs were offered so that we continued to meet our commitments to members and wider stakeholders. We’re particularly proud of our first webinar mini-series delivered in French, as well as the new Practical Philanthropic Conversations course.

The Will Power campaign shone brightly in 2021, with an accelerated plan to go live across Canada as a result of the unique landscape presented by the pandemic. The message of the campaign is entirely fundamental to CAGP’s mission and purpose, and the goals of the campaign are poised to make a transformational impact on our sector. Charities joined up in numbers surpassing targets, leaving us excited for the campaign’s ongoing vitality. At the same time, we remain laser-focused on the fact that we are building – with our partners – for long-term success. Who better understands the concept of perseverance and patience than gift planners? We are ever grateful to those who are joining and staying with us through this journey.

Recognizing you, the individual engaged with CAGP and reading this report, is always a crucial part of what we do. CAGP would not be possible if not for our community of volunteers, chapters, supporters, and others who make our movement so special. One of the most noteworthy indicators of that support is our membership numbers, which hit record-high levels in 2021. We view this as a demonstration of a need for more education and networking in our field, and we are here to serve that growing need.

On that basis, we continue to forge forward with an attitude of abundance, a firmly held belief in kindness, and a vision of a better world through strategic charitable giving.

Heather and Ruth

WITH THANKS TO THE CAGP BOARD OF DIRECTORS

Heather Powers – Chair
Michelle Osborne, CFRE – Past Chair
Geoff Graham, CFRE – Vice Chair
Ninette Bishay, CPA, CA – Treasurer
Michael Blatchford – Secretary
Yolanda Benoit
Janice Feuer
Carmela Guerriero
Serena Hak
Jill Nelson, CFRE
Laily Pirbhai

Ruth MacKenzie President & CEO
Heather Powers Chair of the Board of Directors
2021 HIGHLIGHTS

EDUCATION

2021 saw a full year of delivering national education online, including our first-ever virtual conference, attended by 497 PEOPLE a huge success!

The virtual conference opened up CAGP learning to a host of new attendees who had not experienced our offerings before, and the topics presented have led to a continued commitment by CAGP towards diversity, equity, and inclusion in our work.

We delivered 4 Gift Planning Fundamentals online, Webinar Wednesdays continued to run through 2021, and we launched a brand new online course – Practical Philanthropic Conversations. In addition, we delivered 36 “in-house” training sessions and speaking engagements, customized to individual clients.

MEMBERSHIP

Membership grew continually in 2021, despite the ongoing pandemic, with 1,463 active members as of Dec 31, 2021. That’s an increase of 27.77% from the previous year and a 29% increase since December 2019. In this time of challenge and change, CAGP membership has been a steady rock for our community. Special thanks to our Chapters who have doubled their stewardship efforts to ensure members stay connected and supported.

WILL POWER

Support a charity in your Will

The first year of the cross-country campaign officially launched in Sept. 2021 with over 500 charity and advisor partners joining the movement. In just the first two months of the campaign, 11% of Canadians knew about the campaign and could recall the ads and 42% of Canadians who saw the ads changed their minds and are now more likely to leave a gift in their Will!

In total, 130,000 people explored the idea of leaving a gift in their Will on willpower.ca and 11,500 actions were taken towards leaving a gift in a Will.

FRIENDS OF CAGP 2021

In 2021, Darren Pries-Klassen (top) and Ross Young (bottom) were recognized for their contribution and dedication to the mission of CAGP.
OUR THANKS

CAGP’s success relies heavily on 19 Chapters across Canada that are led by 180 passionate professionals in gift planning who volunteer their time and expertise to represent CAGP in their regions. We can’t thank them enough for their dedication and hard work!

Vancouver Island
Beth Cairns – Chair
Hilary Abbott
Rod Abbott
Laurie Bienert
Alyson Dahl
Kate Donahue
Shelley Engelhardt
Jane Evans
Yvette Guigueno
Jennifer Jasechko
Michelle Johnson
Greg Kuhn
Gordon Larin
Jaime McMillan

Greater Vancouver Area
Raman Johal – Chair
Kate Bake-Patterson
Nicco Bautista
Karen Brown
Celia Campos
Aubrie Girou
Moira Gookstetter
Rory Green
Robert Hamanishi
Aimée Lindenberger
Kris Love
Darya Sawycky
Jeannie Scarfe
Mike Todd
Jane Westheuser
Rich Widdifield
Janice Williams

Kamloops
Alisa Coquet – Co-Chair
Shelby Lomas – Co-Chair
Sasha Carter
Margaret Chrumka
Nena Jocic-Andrejevic

Alberta South
Karen Filbert – Chair
Heather Bach
Heather Berezhowski
Kevin Davidson
Susan Deike
Moses Gabriel
Kathryne Gibson
Kaleigh Goehringer
Rob Locke
Sheelagh Mercier
Neil Williams
Ross Young
Shirley Yurchi

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Melissa Mann – Chair
Trina Mortson
Jen Pederson
Stacey Schewaga
Jay Stark

Saskatchewan South
Kurtis Krug – Chair
Maureen Harrison
Ticia Heward
Michele Krieger
Erin MacAulay
Jeff Norwig
Trina Owens
Leanne Posehn
Crystal Schmalle
Kaleta Strain

Sonia Egey-Samu
Jayde Jessome
Darlene Kowalchuk
Randy Liedtke
Matt Mandrusiak
Kat Mooney
Barb Noble
Sherry Schaefer
Christy Soholt
Laura Svajlenko
Terry Tobin
Manitoba
Jackie Markstrom – Chair
Kathryne Cardwell
Florence Carey
Allison Cranmer
Mia Dunn
Janice Feuer
Pat Lilley
Christopher Mahussier
Rena Molinari
Patrick O’Connor
Beth Proven
Lynda Ruban
Blair Smith
Stephen Webb

Waterloo-Wellington
Jessica Wroblewski – Chair
Lana Dadson
Landon Jennings
Rubin Katakly
Lynn Whetham

Niagara-Golden Horseshoe
Carrie Gemmell – Chair
Darlene Bennett-Howes
Amanda Braet
Joan Cosby
Erin Court
Gena Dureault
Tracy Geoffroy
Joanne Harris-Bedford
Michael Longval
Ricky Piedrahita
Carol Rame
Shauna Reid
Tanya Rumble
Matina Singh

Greater Toronto Area
Janice Correa – Co-Chair
Karen Hudson – Co-Chair
Marisa Barlas
Jack Bergmans
Mikhael Bornstein
Eli Clarke
Clara Eta
Becky Fallis
Abdesh Furmah
Tammy Garcia
Angus Gordon
Ann Gorwill
Serena Hak
Daniel Kachani
Richard Lefebvre
Laura Mullin
Alice Wu

Ottawa
Mitch Miller – Chair
Paul Brousseau
Megan Doyle Ray
Nadine Fowler
Betty-Ann Howard
Katie Loftus
Chelsea McIntyre
Jenny Mitchell
Maurice Prevost
Selva Trebert Sharman

Quebec
Michel Beauchamp – Co-Chair
Antonietta Nicolo – Co-Chair
Karen Bouchard
Gérard Briand
Kim Cavener
Josée Darche
Gina (Luigia) Di Filippo
Nancy Dossous
Lucille Grimard
Jeremy Hampson
Natalia Kistruga
Nancy Lepage
Kim Nguyen
Véronique Salibou
Catherine St-André

Prince Edward Island
Nova Scotia
Elizabeth Finney – Chair
Sara Burke
Toni Croft
Siobhan Doherty
Geoff Graham
John MacDonald
Laura O’Brien
Jill Pelkey
Heather Strickey
Lori Scott

Newfoundland & Labrador
Mike Kidney – Chair
In addition to our Chapters, CAGP’s work is supported by numerous committees that offer their expertise in support of the many aspects of our work nationally. We extend our deepest thanks to the following professionals:

**National Education Committee**
- **Jill Nelson** – Chair
- Claude Drouin
- Ryan Fraser
- Erin Kuhns
- Ruth MacKenzie
- Janice Loomer Margolis
- Paul Nazareth
- Sara Neely
- DeWayne Osborn
- Michelle Osborne
- Lydia Potocnik
- Heather Powers

**Government Relations Committee**
- **Amanda Stacey** – Chair
- Michael Blatchford
- Rick Braun-Janzen
- Malcolm Burrows
- Terrance Carter
- Nicole D’Aoust
- Mark Goldbloom
- Elena Hoffstein
- Robert Kleinman
- Brenda Lee-Kennedy
- Ruth MacKenzie
- Susan Manwaring
- Janice Loomer Margolis
- Margaret Mason
- Grant Monck
- Elizabeth Moxham
- Jill Nelson
- Brad Offman
- Michelle Osborne
- Laily Pirbhai
- Heather Powers
- Jo-Anne Ryan
- Silvia Ugolini
- Ross Young

**Membership Committee**
- **Carmela Guerriero** – Chair
- Yolanda Benoit
- Eli Clarke
- Landon Jennings
- Lara Kinneer
- Clare Levy
- Paul Nazareth
- Jennifer Pederson
- Tanya Rumble
We would also like to recognize and thank these funders and sponsors for their support in 2021.

Abundance Canada
Blackbaud Canada
Blakely
BMO Private Wealth
CAGP Foundation
CanadaHelps
Canadian Donor’s Guide
Cardinal Capital Management
Carters Professional Corporation
CFRE
CI Assante Private Client
DLA Piper (Canada) LLP
DonorPerfect Canada
Environics Analytics
Fasken Martineau DuMoulin LLP
KBF Canada
Miller Thomson LLP
Norton Rose Fulbright Canada
PearTree Canada
PearTree Canada
PGrowth
Private Giving Foundation at TD
Quiet Legacy Planning Group
Raymond James Canada Foundation
RBC Wealth Management – Royal Trust
Scotia Wealth Management
The Donor Motivation Program™
The Foundation (WCPD)
You give us hope
Our deepest gratitude goes to our amazing donors and supporters. 2021 was not the easiest of years but we received unwavering encouragement and we are grateful for it. We thank you all for giving us hope.

We’re inspired
We were able to make a million dollar announcement when Donald K. Johnson pledged this inspirational amount over the next five years. Don’s gift was not only a renewal of his original and extremely generous pledge to us as a Founding Donor, but a DOUBLING of his previous support. His unwavering generosity over the last five years has been vital to our growth in this key phase of our existence and his foresight allows us to continue to build and to dream even bigger.

Paying it forward is powerful
We received a significant gift of $100,000 from Bob and Jill Strachan. Bob is a long-time member of CAGP and a believer in the power of strategic charitable giving.

We’re honoured by your commitment
It should come as no surprise that the majority of our supporters, who are CAGP members and committed volunteers, tend to be loyal, and that they also plan their gifts. We have a 63% donor retention rate! 45% of our donors give through monthly or annual pledges. And we are deeply honoured to have eight legacy commitments.

Bottom line
Our revenue for the year was $621,953, of which $222,855 came from our generous Will Power Campaign funders. The remaining $399,098 allows us to respond innovatively to the growing demand for our resources, education and professional development offerings and gives us the capacity to provide a strong voice for tax policy supporting charitable giving in Canada.

Thank you again to all our supporters for believing in the power of strategic philanthropy to change the world, for making it your life’s work, and for paying it forward with your generosity!

“I have great confidence in the work being accomplished across the country by CAGP – it’s more important and needed than ever, and it strengthens the charitable sector as a whole.”

DON JOHNSON

“This is a way for me to give back. No other organization could have offered me this kind of education and also introduced me to this incredible network of passionate people. I’ve learned so much over the years that I was able to incorporate into my investment and planning practice with philanthropic clients. I see the growth of this good work that will have an impact on communities and charities in Canada and I want to pay it forward.”

BOB STRACHAN

CAGP Foundation Board of Directors
Beth Proven – Chair
Jill Nelson – Vice Chair
Ross Young – Treasurer
Andrew Valentine – Secretary
Janice Feuer
Brad Offman
Ricky Piedrahita
Andrea Robertson
Marcella Zanella

Additional volunteers
Joan Blight
Nicola Elkins
Michelle Johnson
Roger Lee
Greg Lichti
Charles O’Neil
Tina Tehranchian
Keith Thomson

< 8 >
OUR 2021 DONORS AND SUPPORTERS

We’re immensely grateful to our growing family of supporters for their loyalty and generosity.

Legacy Donors
Michelle Johnson
Ruth MacKenzie
Chelsea McIntyre
Paul C.S.C Nazareth
Charles O’Neil
Beth Proven
Keith Thomson
Neil Williams

$500,000 +
Donald K. Johnson

$50,000 +
Benefaction Foundation
The Donor Motivation Program™
Rideau Hall Foundation
Robert & Jill Strachan
Toronto Foundation

$25,000 +
The Conference for Advanced Life Underwriting (CALU)
Doggone Foundation
Private Giving Foundation

$10,000 +
Foundation of Greater Montréal
Jewish Community Foundation
DeWayne Osborn
PearTree Canada
Susan Manwaring
Victoria Foundation

$5,000 +
Rod Abbott
Canadian Legal Wills
Carters Law Firm
Sandra Dow
Jeremy Hampson
Elena Hoffstein
Ruth MacKenzie
Oakville Community Foundation
Amanda Stacey
Saskatoon Community Foundation
Jennifer Stebbing
Tina Tehranchian
Willful
Ross B. & Alison Young

$2,500 +
Yolanda Benoit
Blackwood Family Enterprise Services
Michael Blatchford
Kim Cavener
Epilogue Wills
Geoff C. Graham & James B. Tee
Peggy Killeen
Paul & Chastity Nazareth
Sara Neely
Jill Nelson
Brad Offman
Michelle M.B. Osborne
Heather Powers
Darren & Monika Pries-Klassen
Beth Proven
Jasmine Sweatman
Andrew Valentine

$1,000 +
Joan Blight
Malcolm Burrows
Florence Carey
Janice Feuer
Ian Fraser
Ryan Fraser
Doug & Carla Funk
Serena Hak
Greg Lichti & Garth Norbraten
David Love
Marilyn Monson
Jeffrey Norwig
Charles O’Neil
Ricky Piedrahita
Gregory Snider
Lorna Somers
Conor Tapp
Silvia Ugolini
Ralph & Gay Young Family Capital Fund
Marcella Zanella

$500 +
Ninette Bishay
Doris Cameron
Eli Clarke
Flavelle Family Foundation
Clare Levy
Janice Loomer Margolis
Jen Pederson
Ligia Peña
Laily Pirbhai
Doug Puffer
Anne Thibodeau
Vital Toronto Fund at Toronto Foundation
$250+
Theresa Butler-Porter
CAGP Nova Scotia Chapter
Susan Elias
Leila Fiouzi
Kathryne R. Gibson
Carmela Guerriero
Paola Coronado Hass
Diane Laundy
Sheelagh Mercier
Frank Minton
Maurice Prevost
Thomas G. Riglar
Jayne Whitfield
Neil Williams
and one donor who prefers to remain anonymous

$100+
Maya Ahmad
CAGP Ottawa Chapter
Claude Drouin
Michele Krieger
Sam Laprade
Lakehead Fundraising Association
Meredith Meads
Gordon Moir
The Perley and Rideau Veterans’ Health Centre Foundation
Justin Pilon
Andrea Robertson
Lori Scott
STEGH Foundation
Jennifer Walsom
Anne Marie Watson
Winchester District Memorial Hospital Foundation
and one donor who prefers to remain anonymous

Up to $100
Julia Al Akaila
Candace Boersma
Laura Byl
Colleen DeJager
DonorPerfect Canada
Leah Eustace
Denise Fernandes
Fundraising Everywhere
Carrie Gemmell
Michelle Johnson
Lara Kinnear
Erin Kuhns
John Lepp
Ian Lower
Pat Lilley
Jenny Mitchell
Ottawa Estate Planning Council
QEII Health Sciences Centre Foundation
Alison Stoneman
and one donor who prefers to remain anonymous
# FINANCIALS

For the year ended December 31, 2021

<table>
<thead>
<tr>
<th></th>
<th>National Office</th>
<th>Chapters</th>
<th>CAGP Foundation</th>
<th>TOTAL 2021</th>
<th>TOTAL 2020</th>
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<td><strong>REVENUE</strong></td>
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<td>Will Power campaign memberships and sponsorships</td>
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<td>$ -</td>
<td>$1,479,052</td>
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<td>Job postings</td>
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<td>Chapter events</td>
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<td>26,661</td>
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<td>26,661</td>
<td>31,641</td>
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<tr>
<td>Leave a Legacy and other sponsorships</td>
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<td>24,370</td>
<td>-</td>
<td>24,370</td>
<td>196,137</td>
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<td>Government assistance</td>
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<td>-</td>
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<td>100,235</td>
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<td>Interest and other</td>
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<td>1,573</td>
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<td>13,078</td>
<td>21,633</td>
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<td><strong>Total Revenue</strong></td>
<td>735,862</td>
<td>52,604</td>
<td>1,993,834</td>
<td>2,782,300</td>
<td>1,614,996</td>
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<tr>
<td><strong>EXPENSES</strong></td>
<td></td>
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<tr>
<td>Will Power campaign</td>
<td>-</td>
<td>-</td>
<td>958,870</td>
<td>958,870</td>
<td>343,197</td>
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<td>Personnel</td>
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<td>277,406</td>
<td>646,551</td>
<td>556,232</td>
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<td>Conference</td>
<td>231,760</td>
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<td>231,760</td>
<td>147,071</td>
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<tr>
<td>Administration</td>
<td>98,471</td>
<td>49,413</td>
<td>14,793</td>
<td>162,677</td>
<td>106,466</td>
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<tr>
<td>Professional fees</td>
<td>84,772</td>
<td>-</td>
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<td>44,308</td>
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<tr>
<td>Fundraising</td>
<td>-</td>
<td>-</td>
<td>60,501</td>
<td>60,501</td>
<td>46,039</td>
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<tr>
<td>Rent</td>
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<td>-</td>
<td>14,502</td>
<td>35,764</td>
<td>37,277</td>
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<tr>
<td>Leave a Legacy</td>
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<td>19,899</td>
<td>172,641</td>
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<tr>
<td>Memberships and honorariums</td>
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<td>10,704</td>
<td>19,549</td>
<td>20,152</td>
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<tr>
<td>Sponsorship</td>
<td>-</td>
<td>-</td>
<td>17,380</td>
<td>17,360</td>
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<tr>
<td>Chapter events</td>
<td>-</td>
<td>2,958</td>
<td>-</td>
<td>2,958</td>
<td>43,619</td>
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<td>Meals, travel and accommodation</td>
<td>329</td>
<td>-</td>
<td>-</td>
<td>329</td>
<td>38,830</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>814,584</td>
<td>72,270</td>
<td>1,354,253</td>
<td>2,241,107</td>
<td>1,555,832</td>
</tr>
<tr>
<td><strong>NET REVENUE (EXPENSES) BEFORE INTER-FUND REVENUE AND EXPENSES</strong></td>
<td>(78,722)</td>
<td>(19,666)</td>
<td>639,581</td>
<td>541,193</td>
<td>59,164</td>
</tr>
<tr>
<td>Contribution from Chapter to CAGP Foundation</td>
<td>-</td>
<td>(8,960)</td>
<td>8,960</td>
<td>-</td>
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</tr>
<tr>
<td>Chapter grants</td>
<td>(35,810)</td>
<td>59,635</td>
<td>(23,825)</td>
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<tr>
<td>Management fee</td>
<td>110,549</td>
<td>-</td>
<td>(10,549)</td>
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<td>-</td>
</tr>
<tr>
<td>Membership fees</td>
<td>21,270</td>
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<td>(21,270)</td>
<td>-</td>
<td>-</td>
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<td>Conference bursaries</td>
<td>12,475</td>
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<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sponsorship</td>
<td>32,079</td>
<td>-</td>
<td>(32,079)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>NET REVENUE (EXPENSES) FOR THE YEAR</strong></td>
<td>$ 61,841</td>
<td>$ 18,534</td>
<td>$ 460,818</td>
<td>$ 541,193</td>
<td>$ 59,164</td>
</tr>
</tbody>
</table>

For a complete set of the 2021 Audited Financial Statements, please visit [this link](#).
ABOUT US

Join us in making the world a better place through strategic charitable giving! Join Us.

OUR TEAM

**Deidre Causton**
Executive Assistant

**Laurie Fox**
Director, Will Power Campaign

**Nancy Ho**
Manager, Will Power Campaign

**Peggy Killeen**
Development Director, CAGP Foundation

**Lara Kinnear**
Membership Coordinator

**Erin Kuhns**
Manager, Education & Training

**Caralen Law**
Conference & Event Planner

**Clare Levy**
Director, Strategic Communications & Stakeholder Relations

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

**Paul Nazareth**
Vice-President, Education & Development

**Jaymie Oakes**
Administrative Assistant, Finance & Donor Relations

*Canadian Association of Gift Planners*
14 Chamberlain Avenue, Suite 201A
Ottawa, Ontario K1S 1V9
1.888.430.9494
info@cagp-acpdp.org