



2021

IMPACT REPORT

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



Heather Powers
Chair of the Board
of Directors



Ruth MacKenzie
President & CEO

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

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.

6,450

Total engagements
with CAGP
education in 2021



 **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.

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.

1,463

active
members as of
Dec 31, 2021



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 Jovic-Andrejevic

Alberta North

Leona Yez – Past Chair

Jamie Craig

Sonia Egey-Samu
Jayde Jessome
Darlene Kowalchuk
Randy Liedtke
Matt Mandrusiak
Kat Mooney
Barb Noble
Sherry Schaefer
Christy Soholt
Laura Svajlenko
Terry Tobin

Alberta South

Karen Filbert – Chair

Heather Bach
Heather Berezowski
Kevin Davidson
Susan Deike
Moses Gabriel
Kathryne Gibson
Kaleigh Goehringer
Rob Locke
Sheelagh Mercier
Neil Williams
Ross Young
Shirley Yurchi

Saskatchewan North

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

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

Windsor & Essex County

Lisa Kolody – Chair

Kelly Gosselin
Sandra Presland
Patricia Valteau
Peggy Winch

Chatham-Kent

Lisa Caron – Chair

Brad Davis
Jodi Maroney
Margery Muharrem
Anne Taylor

London

Justin Pilon – Chair

Gord Baptist

Adam Chapman

Trish Gergich

Sue Hardy

Vicki Hayter

Sarah Morkin

Waterloo-Wellington

Jessica Wroblewski – Chair

Lana Dadson
Landon Jennings
Rubin Katakai
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 Salibur
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 Kinnear
Clare Levy
Paul Nazareth
Jennifer Pederson
Tanya Rumble

National Advisor Council

Lydia Potocnik – Chair
BMO Private Wealth

Jordyn Allan
Miller Thomson LLP

Michel Beauchamp
Beauchamp et Gilbert,
notaires inc.

Christine Brunsden
Trusted Legacy

Malcolm Burrows
Scotia Wealth
Management

Jennifer Button
RBC Royal Trust

Florence Carey
F I Carey Law Corp

Ryan Fraser
Quiet Legacy
Planning Group

Mark Halpern
WEALTHinsurance

Jeremy Hampson
CI Assante

Gordon Holley
Humanity Financial
Management Inc.

Ian Hull
Hull & Hull LLP

Candice Jay
Connor, Clark & Lunn

Kurtis Krug
Freedom 55 Financial

Jonathan Lewis
Eastport Financial Group

Bradley Offman
Spire Philanthropy

Jo-Anne Ryan
TD Private
Giving Foundation

Amanda Stacey
Miller Thomson LLP

Glenn Stewardson
Assante Hydrostone

Stephen Webb
Entrust Financial Services

Ross Young
ICP Planning

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

PGgrowth

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)

GRATITUDE REPORT FROM THE CAGP FOUNDATION



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.

"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

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.

"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

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!

CAGP Foundation Board of Directors

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

Additional volunteers

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

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 Laundry
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 Lewer
Pat Lilley
Jenny Mitchell
Ottawa Estate
Planning Council
QEll Health Sciences
Centre Foundation
Alison Stoneman
*and one donor who prefers to remain
anonymous*

FINANCIALS

For the year ended December 31, 2021

	National Office	Chapters	CAGP Foundation	TOTAL 2021	TOTAL 2020
REVENUE					
Will Power campaign memberships and sponsorships	\$ -	\$ -	\$ 1,479,052	\$ 1,479,052	\$ 350,675
Donations	-	-	371,728	371,728	228,129
Membership fees	328,593	-	-	328,593	286,846
Conference	308,874	-	-	308,874	143,417
Education courses and designation program	32,047	-	143,054	175,101	234,183
Job postings	36,490	-	-	36,490	22,100
Chapter events	-	26,661	-	26,661	31,641
Leave a Legacy and other sponsorships	-	24,370	-	24,370	196,137
Government assistance	18,353	-	-	18,353	100,235
Interest and other	11,505	1,573	-	13,078	21,633
	735,862	52,604	1,993,834	2,782,300	1,614,996
EXPENSES					
Will Power campaign	-	-	958,870	958,870	343,197
Personnel	369,145	-	277,406	646,551	556,232
Conference	231,760	-	-	231,760	147,071
Administration	98,471	49,413	14,793	162,677	106,466
Professional fees	84,772	-	117	84,889	44,308
Fundraising	-	-	60,501	60,501	46,039
Rent	21,262	-	14,502	35,764	37,277
Leave a Legacy	-	19,899	-	19,899	172,641
Memberships and honorariums	8,845	-	10,704	19,549	20,152
Sponsorship	-	-	17,360	17,360	-
Chapter events	-	2,958	-	2,958	43,619
Meals, travel and accommodation	329	-	-	329	38,830
	814,584	72,270	1,354,253	2,241,107	1,555,832
NET REVENUE (EXPENSES) BEFORE INTER-FUND REVENUE AND EXPENSES					
	(78,722)	(19,666)	639,581	541,193	59,164
Contribution from Chapter to CAGP Foundation	-	(8,960)	8,960	-	-
Chapter grants	(35,810)	59,635	(23,825)	-	-
Management fee	110,549	-	(110,549)	-	-
Membership fees	21,270	-	(21,270)	-	-
Conference bursaries	12,475	(12,475)	-	-	-
Sponsorship	32,079	-	(32,079)	-	-
NET REVENUE (EXPENSES) FOR THE YEAR	\$ 61,841	\$ 18,534	\$ 460,818	\$ 541,193	\$ 59,164

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



CAGP 2021 IMPACT REPORT

Canadian Association of Gift Planners

14 Chamberlain Avenue, Suite 201A
Ottawa, Ontario K1S 1V9

1.888.430.9494

info@cagp-acpdp.org