



2023

IMPACT REPORT



LEADERSHIP REFLECTION

WHILE NOT WITHOUT ITS CHALLENGES, 2023 HAD MANY BRIGHT SPOTS AND SUCCESSES THAT INSPIRED AND MOTIVATED US.

CAGP's membership has continued to grow, hitting our highest numbers ever. As a community of professionals, an accomplishment like that continues to send a message of how important this network is to those with an interest in strategic giving.

Much of that growth in membership can be attributed to the Will Power campaign and the array of charities and advisors who have signed up to be part of this incredible journey. In only four years, Will Power has had some staggering results in campaign visibility, and changing the minds of Canadians about gifts in Wills.

Education will always be cornerstone to what CAGP is all about as we aim to ensure excellence in the gift planning profession. The demand is clear, though a lingering disinclination to in-person gatherings meant we needed to continue to innovate with online platforms that enable the ever-important shared learning experience that our education offerings are known for.

Our Government Relations Committee played a vital role in voicing concerns over proposed legislative changes to the Alternative Minimum Tax which potentially puts millions of dollars of charitable gifts at risk. 180 charities joined us in declaring their support for our ask that the government find other ways to achieve their goal of fairer taxation that won't impact the important work charities do.

As we take interim steps in our programming and engagement to create a more welcoming and safe organization, our Board and our staff are examining and discussing these issues with openness and humility as to the entire future of the organization. Our strategic planning discussions started in 2023 and continue pushing into 2024. Our aim is to be both thoughtful and intentional, while recognizing an urgency for meaningful, impactful change both within our organization and for the broader philanthropic landscape.

Lastly, we must thank the community: CAGP members, Chapters, Volunteers, and our Boards of Directors, and the dedicated and passionate staff team, as well as a wider community of stakeholders. In addition, to the donors who give so generously to the CAGP Foundation, thank you for the gifts you bring to our work and our shared purpose.

Thank you and stay well,

GEOFF GRAHAM AND RUTH MACKENZIE



GEOFF GRAHAM, CFRE
CHAIR OF THE BOARD
OF DIRECTORS



RUTH MACKENZIE
PRESIDENT & CEO

WITH THANKS TO THE CAGP BOARD OF DIRECTORS

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DANZEL PINTO
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HEATHER POWERS
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MAYA AHMAD

MICHAEL BLATCHFORD

CARMELA GUERRIERO

JEN PEDERSON

LAILY PIRBHAI

LAND ACKNOWLEDGEMENT



OUR STAFF, OPERATIONS, WORK, AND NETWORK DEPEND ON TRADITIONAL INDIGENOUS TERRITORIES TO PROVIDE US PHYSICAL SPACE, SUSTENANCE, SAFETY, AND COMMUNITY TO WORK, LIVE, AND PLAY.

Our physical office is located in Ottawa, on the unceded, unsundered Territory of the Anishinaabe Algonquin Nation whose presence here reaches back to time immemorial. We recognize the Algonquins as the customary keepers and defenders of the Ottawa River Watershed and its tributaries.

We acknowledge that our ability to live and work on these lands today is a direct benefit of policies of expulsion and assimilation of Indigenous peoples during the time of settlement and Confederation, and since. The harms of these policies are many and are still being felt in Indigenous communities today. We express gratitude towards the Indigenous peoples who have and will continue to steward these lands. We commit to amplifying the voices of Indigenous peoples and working against the everyday forces of white supremacy and colonialism present in the nonprofit sector.



2023 HIGHLIGHTS

EDUCATION

In 2023, CAGP delivered two Gift Planning Fundamentals courses online as well as two in-person, including one in French. The Original Canadian Gift Planning course, and the Bequest Administration Essentials course, which was delivered online, both sold out and were very successful. We also continued with our Webinar Wednesdays series, which we delivered in both English and French, and we delivered 16 “in house” gift planning training sessions and speaking engagements to charities and professional advisor organisations.

4,929

Total engagements with CAGP education in 2023

CONFERENCE

The 2023 CAGP Conference was held in beautiful Vancouver, BC, where 390 delegates attended from across Canada. The theme was Growing Together, Making Change. Topics presented during the conference have led to a continued commitment by CAGP for diversity, equity and inclusion in our work, as we move towards a more nuanced and broader concept of philanthropy.

2023 In-person Conference:

390 DELEGATES

FRIEND OF CAGP AWARD



In 2023, Calvin Fong and Ryan Fraser were recognized for their contribution and dedication to the mission of CAGP.

MEMBERSHIP

In 2023, CAGP continued to see record high membership numbers. We had 1,498 active members as of December 31, 2023 and over 300 new members joined the organisation throughout the year.

1,498

ACTIVE MEMBERS AS OF DECEMBER 31, 2023

311

NEW MEMBERS JOINED IN 2023

62

ORGANIZATIONS WITH GROUP MEMBERSHIPS

394

MEMBERS ARE WILL POWER PARTNER, BOTH CHARITIES AND ADVISORS

2023 HIGHLIGHTS



GOVERNMENT RELATIONS

2023 included a big surprise in tax policy that incentivizes charitable giving, when the Federal Budget made changes to the Alternative Minimum Tax (AMT) in an effort reach its goals of fairer taxation for wealthy Canadians. The proposed changes roll back charitable tax incentives that have been in place for decades, and run counter to the government's long-standing commitment to support the work of the charitable sector, in part, through tax policy. The changes also put millions of dollars of charitable donations at risk.

CAGP's Government Relations Committee led a charge to let the government know our position by making a comprehensive submission and presenting a technical analysis of how the AMT changes would impact large, transformational gifts. The sector rallied behind CAGP's submission with over 180 Canadian charities adding their signature to a letter of support.

The outcome of these efforts may have been announced already. Regardless, CAGP's essential leadership in government relations has rarely been more evident.



Will Power continued its push to show Canadians they can do more with their Will, and leave a gift to a cause they care about.

We were happy to see

585K MORE PEOPLE

come to willpower.ca in 2023, and spend more time learning how to donate in their Will.

Our audience is going deeper into their planning, and it's great to see

109%

more of them checking out our charity partners in the process.

WITH THIS SHIFT, THE CAMPAIGN IS NOW
TURNING ITS ATTENTION TO DRIVING ACTION IN 2024.

**WE LOOK FORWARD TO SHARING OUR
LEARNINGS WITH YOU NEXT YEAR.**

CHAPTERS

CAGP'S SUCCESS RELIES HEAVILY ON THE 16 CHAPTERS ACROSS CANADA THAT ARE LED BY 148 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
Alli Cheng
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Rich Widdifield

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Joel Bray
Sheelagh Mercier
Whitney Rosborough
Alena Schock
Christina Stein
Neil Williams

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Laura Svajlenko – Co-Chair
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Trina Owens
Leanne Posehen
Crystal Schmalle
Kaleta Strain

CHAPTERS

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Mia Dunn
Janice Feuer
Elena Grinshteyn
Jackie Markstrom
Rena Molinari
Patrick O'Connor
Beth Proven
Monica Sigurdson
Blair Smith
Susan Yakabowich

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Gemma Grey-Hall
Tim Jones
Lisa Kolody
Karen Momotiuk
Sandra Presland
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Eric Patterson
Promod Sharma
Phoebe Uguy
Jayne Whitfield
Sarah Zachariah

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Erin Meisner
Mitch Miller
Maurice Prevost

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Natalia Kistruga
Nancy Lepage
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Catherine St-André

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Jordan Fisher
Liz Finney
Geoff Graham
Terri Mann
Lori Scott
Glenn Stewardson
Heather Strickey
Natalie Valcour

COMMITTEES

WE ALSO RECOGNIZE THE VITAL ROLE OF OUR COMMITTEES AND THE EXPERTISE AND SUPPORT THEY BRING TO OUR WORK ACROSS THE NATION. WE EXTEND OUR DEEPEST THANKS TO ALL VOLUNTEERS SERVING ON THOSE COMMITTEES FOR THEIR DILIGENT WORK TO FULFILL CAGP'S MISSION.

NATIONAL EDUCATION COMMITTEE

Ryan Fraser – Chair
Maya Ahmad
Kathy Arney
Florence Carey
Claude Drouin
Geoff Graham
Erin Kuhns
Ruth MacKenzie
Paul Nazareth
Jill Nelson
DeWayne Osborn
Michelle Osborne
Lydia Potocnik
Sharon Redsky
Kerry Shillito

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Rick Braun-Janzen
Malcolm Burrows
Jennifer Button
Terrance Carter
Nicole D'Aoust
Mark Goldbloom
Geoff Graham
Elena Hoffstein
Robert Kleinman
Kate Lazier
Brenda Lee-Kennedy
Janice Loomer-Margoilis
Ruth MacKenzie
Susan Manwaring
Margaret Mason
Brenda McEachern
Grant Monck
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Brad Offman
Laily Pirbhai
Heather Powers
Jo-Anne Ryan
Amanda Stacey
Silvia Ugolini
Ross Young

MEMBERSHIP COMMITTEE

Carmela Guerriero – Chair
Eli Clarke
Geoff Graham
Landon Jennings
Henrietta Lam
Laily Pirbhai
Jen Pederson
Paul Nazareth
Lara Kinnear

FUNDERS AND SUPPORTERS

WE WOULD LIKE TO RECOGNIZE AND THANK THESE FUNDERS AND SPONSORS FOR THEIR SUPPORT IN 2023.

Abundance Canada
Advocis
BC Children's Hospital Foundation
BMO Wealth Management
Benefaction Foundation
CanadaHelps
Canada Life
Canadian Donor's Guide
Cardinal Capital Management Inc.
Carters Professional Corporation
CFRE
CIBC Private Wealth Management
CI Assante
DLA Piper
The Donor Motivation Program®
DonorPerfect
Environics Analytics
Epilogue
The Foundation WCPD
Global Philanthropic
GoodWorks
Gowling WLG
KBF Foundation
KPMG
Legacy Leaders
Miller Thomson LLP
Norton Rose Fulbright Canada
PGgrowth
PearTree Financial Services Ltd.
Private Giving Foundation available through TD
RBC Royal Trust
Raymond James Canada Foundation
Scotia Wealth Management
Solus Trust Company Limited





REPORT FROM THE CAGP FOUNDATION

LEADERSHIP

2023 was marked by the passing of Calvin Fong, our Founding Chair. In 2016 Calvin oversaw our charitable registration and steered us through tasks, discussions and the development of our strategic direction. Calvin's expertise and reputation were exactly what was needed in the Foundation's formative years. He put in an extraordinary amount of time and energy, keeping the big picture in mind while always paying attention to detail. His ethics and integrity were evident in every meeting.

Calvin was commemorated by many members of the gift planning community around the country, including a generous \$10,000 gift from his employer, the Vancouver Foundation, in memory of their cherished colleague.

Our 2023 Gratitude report is presented in honour of Calvin, through the broad themes of loyalty, sustainability and legacy.

LOYALTY

We are proud to continue our tradition of exemplary donor retention. At 71%, our donor retention rate is 26% higher than the sector average. An amazing one third of our donors give through monthly gifts.

SUSTAINABILITY

We are steadfastly supported by many multi-year pledge donors. We are particularly grateful to **Keith and Tanja Thomson, Donald K. Johnson** and the **Benefaction Foundation** for continuing to believe in the importance of our work.

LEGACY

We are incredibly proud to have increased our number of legacy donors to 12. We are honoured to have been made part of your life stories. You are an inspiration to us all.

THE FIGURES

We raised \$587,418 in gifts and pledges and our actual revenue was \$566,933. Our endowment at The Winnipeg Foundation now stands at \$37,026.

"CHANGE AND PROGRESS CANNOT BE ACHIEVED ALONE. THE BEST RESULTS ARE ALWAYS A PRODUCT OF COLLABORATION, CONSULTATION AND PARTNERSHIP!"

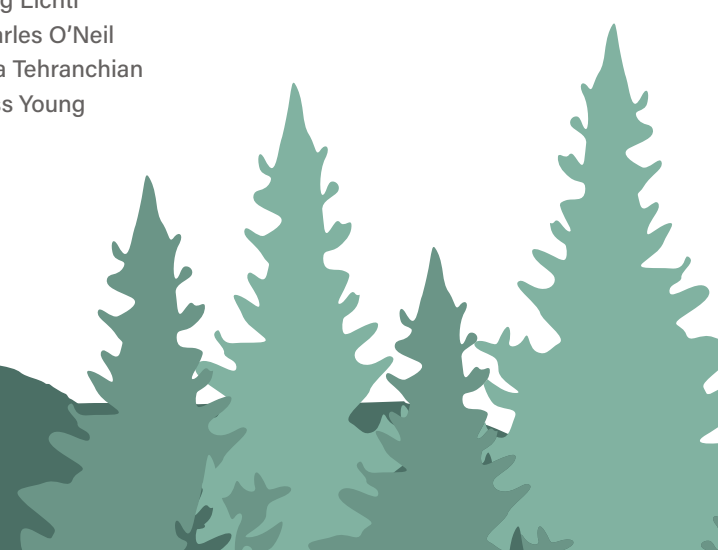
Calvin Fong, at the launch of the CAGP Foundation in 2017

CAGP FOUNDATION BOARD OF DIRECTORS

Jill Nelson – Chair
Michelle Osborne – Vice-chair
Amanda Stacey – Secretary
Ninette Bishay – Treasurer
Beth Proven – Past-chair
Barbara Chambers
Grant Monck
Brad Offman
Ricky Piedrahita
Marcella Zanella

ADDITIONAL VOLUNTEERS

Nicola Elkins
Roger Lee
Greg Lichti
Charles O'Neil
Tina Tehranchian
Ross Young



DONORS

THIS YEAR WE'VE DECIDED TO HIGHLIGHT THE THEMES IN THIS REPORT, WHILE STRIVING TO BE MORE EQUITABLE IN OUR RECOGNITION PRACTICES. WE'VE ALPHABETICALLY LISTED OUR DONORS IN THE CATEGORIES OF ANNUAL, MONTHLY, MULTI-YEAR PLEDGES, AND LEGACY.

LEGACY DONORS

Serena Hak
Michelle Johnson
Ruth MacKenzie
Chelsea McIntyre
Paul C.S.C. Nazareth
Jill Nelson
Charles O'Neil
Beth Proven
Doug Puffer
Keith Thomson
Gillian Whyte
Neil Williams

MULTI-YEAR PLEDGES

Benefaction Foundation
Florence Carey
Carters Law Firm
Jennifer Chegus
The Conference for Advanced Life Underwriting (CALU)
The Donor Motivation Program®
Donald K. Johnson
Michele Krieger
Jackie Markstrom
Margaret Mason KC
Grant Monck
Charles O'Neil
Power Corporation of Canada
Darren & Monika Pries-Klassen
Saskatoon Community Foundation
Glenn Stewardson
Tina Tehranchian
Silvia Ugolini
Victoria Foundation

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Jennifer Benedict
Yolanda Benoit
Ninette Bishay
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Kim Cavener
Barbara Chambers
Eli Clarke
Nicola Elkins
Emelita Ervin
Kim Falconer
Janice Feuer
Carrie Gemmell
Geoff C. Graham & James B. Tee
Betty-Anne Howard
Peggy Killeen

DONORS

MONTHLY DONORS (CONTINUED)

Erin Kuhns
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Greg Lichti & Garth Norbraten
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Ruth MacKenzie
Susan Manwaring
Paul & Chastity Nazareth
Jill Nelson
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Michelle M.B. Osborne
Jen Pederson
Ligia Peña
Ricky Piedrahita
Justin Pilon
Heather Powers
Maurice Prevost
Beth Proven
Doug Puffer
Amanda Stacey
Conor Tapp
Anne Thibodeau
Andrew Valentine
Jennifer Walsom
Ross B. & Alison Young
Marcella Zanella

ANNUAL DONORS

Abundance Canada
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Nicole Bedard
Peter Bennett
Malcolm Berry
John Blachford
Joan Blight
Malcolm Burrows
Laura Byl
CAGP Manitoba Chapter
CAGP Ottawa Chapter
CAGP Québec Chapter
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Megan Doyle Ray
Mia Dunn
Endora Fan
Fidelity Investments Canada
Daniel Frajman
Ian Fraser
Ryan Fraser
Rob Gagliano
Aneil Gokhale
Sherri Grosz
Carmela Guerriero
Serena Hak
Patricia L. Hrymack
Michelle Johnson
Lara Kinnear
Robert A. Kleinman & Alice Herscovitch
Sarah Kreplin
Kate Lazier
CEBE Lee Family Fund, held at
Vancouver Foundation
Roger Lee
Frank Lockington
Katie Loftus

Janice Loomer Margolis
Kristine Love
Mary Lou Miles
Jenny Mitchell
Gordon Moir
Marilyn Monson
Trina Mortson
Sara Neely
Alen Okanovic
PearTree Canada
Danzel Pinto
Laily Pirbhai
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Janine Purves
Thomas G. Riglar
Dana Rushak
Véronique Salibur
Janice St-Denis
Dana Thomson
Toronto Foundation
Natasha van Bentum
Vancouver Foundation
Vital Toronto Fund at
Toronto Foundation
Holly Wagg
Richard Widdifield & Andrea Hannon
Tyler Wiebe
The Donor Engagement Team at
The Winnipeg Foundation

FINANCIALS

FOR THE YEAR ENDED DECEMBER 31, 2023

	National Office	Chapters	CAGP Foundation	TOTAL 2023	TOTAL 2022
REVENUE					
Will Power campaign memberships and sponsorships	\$ -	\$ -	\$ 1,268,132	\$1,268,132	\$1,330,496
Conference	553,523	-	-	553,523	439,133
Membership fees	373,156	-	-	373,156	333,335
Education courses and designation program	40,642	-	301,792	342,434	340,177
Donations	-	-	322,532	322,532	484,685
Interest and other	55,131	9,058	14,218	78,407	18,356
Chapter events	-	47,806	-	47,806	24,764
Job postings	36,250	-	-	36,250	42,610
Leave a Legacy and other sponsorships	-	6,412	-	6,412	19,154
	1,058,702	63,276	1,906,674	3,028,652	3,032,710
EXPENSES					
Will Power campaign	-	-	903,750	903,750	1,422,680
Personnel	447,439	-	279,964	727,403	692,002
Conference	501,639	-	-	501,639	365,638
Professional fees	141,269	-	44,776	186,045	148,090
Administration	63,272	43,345	29,956	136,573	150,793
Meals, travel and accommodation	28,039	-	71,229	99,268	85,503
Fundraising	-	-	69,366	69,366	69,847
Chapter events	-	34,727	-	34,727	39,387
Memberships and honorariums	11,643	-	15,878	27,521	28,678
Rent	10,470	-	6,980	17,450	16,821
Leave a Legacy	-	-	-	-	568
	1,203,771	78,072	1,421,899	2,703,742	3,020,007
NET REVENUE (EXPENSES) BEFORE INTER-FUND REVENUE AND EXPENSES					
	(145,069)	(14,796)	484,775	324,910	12,703
Chapter grants	(40,539)	40,539	-	-	-
Conference bursaries	19,858	(19,858)	-	-	-
Management fee	99,782	-	(99,782)	-	-
Management fee - Will Power campaign	9,198	-	(9,198)	-	-
Sponsorship	5,000	(5,000)	-	-	-
NET REVENUE (EXPENSES) FOR THE YEAR	\$ (51,770)	\$ 885	\$ 375,795	\$ 324,910	\$ 12,703

ABOUT US

**JOIN US IN MAKING THE WORLD A BETTER PLACE
THROUGH STRATEGIC CHARITABLE GIVING!**

IGOR FERNANDES
COMMUNICATIONS
COORDINATOR

ERIN KUHNS
MANAGER, EDUCATION
& TRAINING

PAUL NAZARETH
VICE-PRESIDENT, EDUCATION
& DEVELOPMENT

LAURIE FOX
DIRECTOR, WILL POWER
CAMPAIGN

CARALEN LAW
CONFERENCE & EVENT PLANNER

JAYMIE OAKES
ADMINISTRATIVE ASSISTANT,
FINANCE & DONOR RELATIONS

NANCY HO
MANAGER, WILL POWER
CAMPAIGN

CLARE LEVY
DIRECTOR, STRATEGIC
COMMUNICATIONS &
NETWORK ENGAGEMENT

VIKRANT SINGH
DIGITAL MARKETING
MANAGER, WILL POWER

PEGGY KILLEEN
DEVELOPMENT DIRECTOR,
CAGP FOUNDATION

RUTH MACKENZIE
PRESIDENT & CEO, CAGP
/ EXECUTIVE DIRECTOR,
CAGP FOUNDATION

DANA THOMSON
EXECUTIVE ASSISTANT

LARA KINNEAR
MEMBERSHIP COORDINATOR



Canadian Association
of Gift Planners

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