

A high-contrast, close-up photograph of a single water droplet suspended just above a surface, with concentric ripples radiating outwards from the point of impact. The background is a soft, out-of-focus blue.

2019

/im,pakt/
report

/im,pakt/

verb: have a strong effect
on someone or something

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1 from the top

This year, rather than a traditional Annual Report, we've chosen to share an Impact Report with you. IMPACT sets a powerful and inspiring tone for CAGP, where we've come from, what we've achieved, where we're headed.

A key focus for the CAGP Board this past year was crafting and launching a new strategic plan. In doing so, we naturally reflected on our accomplishments over the course of the previous plan; successes like setting up the CAGP Foundation, greatly expanding education, a first-ever Symposium for Chapter Chairs, growing our staff team enabling us to accomplish so much more, new research, launching a new designation for professional advisors - the MFA-P, Master Financial Advisor in Philanthropy. Throughout this Impact Report, you will see how the foundations laid by these past decisions and investments have had a dramatic impact on the reach and scope of work we are achieving together as an association.

We also know we can always do more, do better. CAGP is an important voice on tax policy and charitable giving, but as we rely heavily on the time and talent of highly-skilled (and busy!) volunteers, we sometimes fall short in providing sufficient, expert support to maximize impact. This is something we will continue to work on, and is a key pillar of the new strategic plan.

We expect the impact of having leaders from our vital Chapters engaged in the development of the new strategic plan will be immense. We now have a **collective** plan that will strive to meet our collective vision, and reach our intended impact of *A vibrant network and donor community embracing and advancing strategic charitable giving in Canada.*

While this report showcases our impact in 2019, in the new **strategic plan** our members will see attention put on the areas we know we need to strengthen to make **future impact**. We're particularly excited to be working with the CAGP Foundation to launch a new public-facing campaign - **Will Power** - that will make leaving a gift to a charity in a will common place; an initiative poised to have unprecedented impact for Canada's vital charities.

We've set the bar for our impact high but, like many of you, we find the challenge stimulating and motivating. We also know that when facing the inevitable challenges, it's our collective - our members, volunteers, leaders, supporters, partners - who will ultimately make impact possible.

Thank you!



Michelle Osborne
Chair of the Board of Directors



Ruth MacKenzie
President & CEO

- with thanks to the CAGP Board -

Michelle Osborne, CFRE - **Chair**
Heather Powers - **Vice Chair**
Amanda Stacey - **Past Chair**
Ninette Bishay, CPA, CA - **Treasurer**

Geoff Graham, CFRE - **Secretary**
Yolanda Benoit
Michael Blatchford
Jill Nelson, CFRE

Beth Proven
Conor Tapp
Keith Thomson



2019 impact



1,780

people participated in courses and webinars



27

Master Financial Advisor-Philanthropy (MFA-P) designations earned



3,553

people reached through outreach and presentations

646

professional advisors engaged with us



We have now achieved **6½ times** more education and engagement across Canada since 2016, when the Foundation was established!

CAGP FOUNDATION



6

legacy donors



100%

CAGP Board Members & Foundation Board Members are donors



\$487,960

raised in gifts and pledges



Tea consumed at the CAGP office =



GOVERNMENT RELATIONS HIGHLIGHTS

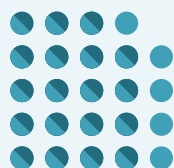


CEO quoted in Special Senate Committee Report

Member interest in GR demanded a **full plenary session** at national conference

We weighed in on a proposed legislative amendment regarding the **tax treatment** of employee stock options

Out front in gathering more information about the issue of **gifts of life insurance** in BC



19

committee members

24

years of strategic government relations work



22

cities, towns, communities visited in 2019



OUR BIGGEST CONFERENCE YET!

507 attendees



#CAGP19

reached 328,100 people

Introduced a new



strategic plan, setting the stage for **our future impact!**



3 our thanks

CAGP's success relies heavily on the **20 Chapters across Canada** that are led by **153 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

Michelle Johnson – Chair
Hilary Abbott
Natasha Benn
Laurie Bienert
Alyson Dahl
Kate Donahue
Don Gordon
Yvette Guigeno
Lucy Hough
Jennifer Jasechko
Laurie Palmer
Kaila Pilecki

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Aubrie Girou
Nicole Jeschelnik
Kris Love
Leanne Poon
Darya Sawycky
Jeannie Scarfe
Mike Todd
Janice Williams

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Sarah Sandholm – Co-Chair
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Margaret Chrumka
Nena Jovic-Andrejevic
Shelby Lomas

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Susan Deike
Karen Filbert
Kathryne Gibson
Rob Locke
Neil Williams
Ross Young
Shirley Yurchi

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Darlene Kowalchuk
Randy Liedtke
Matt Mandrusiak
Deborah McKinnon
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Laura Svajlenko
Leisa Tarr

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Vicki Corbin
Jen Pederson
Trina Mortson
Jay Stark

Saskatchewan South

Trina Owens – Chair
Ticia Heward
Kurtis Krug
Jeff Norwig
Leanne Posehn
Crystal Schmalle
Kaleta Strain

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Pat Lilley – Chair
Florence Carey
Allison Cranmer
Mia Dunn
Janice Feuer
Jackie Markstrom
Rena Molinari
Patrick O'Connor
Lynda Ruban
Stephen Webb

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Lisa Kolody
Martin Sobocan
Kim Willis

Sarnia-Lambton

Jane Anema – Chair

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
Linda O'Connor

Waterloo-Wellington

Jessica Wroblewski – Chair
Heather Curran
Rubin Katak

Niagara-Golden Horseshoe

Ricky Piedrahita – Chair
Joanne Bedford-Harris
Darlene Bennett-Howes
Trevor Cooper
Joan Cosby
Carrie Gemmell
Tracy Geoffroy
Michael Longval
Shauna Reid
Tanya Rumble

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Mikhael Bornstein
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Sandra Dow
Becky Fallis
Abdesh Furmah
Tammy Garcia
Aneil Gokhale
Ann Gorwill
Karen Hudson
Daniel Kachani
Winsor Pepall

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Katie Loftus
Brian McFarlane
Chelsea McIntyre
Jenny Mitchell
Maurice Prevost
Selva Trebert Sharman

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Gina Di Filippo
Susan Elias
Samar El Soufi
Lucille Grimard
Jeremy Hampson
Nancy Lepage
Antonietta Nicolo

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Myrtle Jenkins Smith
Rosie Shaw

Nova Scotia

Lori Scott – Chair
Sara Burke
Doris Cameron
Toni Croft
Siobhan Doherty
Liz Finney
Jenna Joyce
John MacDonald
Arleen Stevens

Newfoundland & Labrador

Mike Kidney – Chair



3 our thanks

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:

Conference Local Host Committee (Regina)

Kurtis Krug – Co-Chair
Trina Owens – Co-Chair
Bev Cooper
Lisa Green
Maureen Harrison
Ticia Heward
Melissa Mann
Leanne Posehn
Hannah Sackville
Stacey Schewaga
Kaleta Strain
Donna Ziegler

Conference Program Committee

Denise Fernandes – Chair
Ryan Fraser
Aneil Gokhale
Lisa Green
Erin Kuhns
Ruth MacKenzie
Melissa Mann
Jill Nelson
Alen Okanovic
Charles O'Neil
Lydia Potocnik
Heather Powers
Marcella Zanello

National Education Committee


Michelle Osborne – Acting Chair
Erin Kuhns
Janice Loomer Margolis
Ruth MacKenzie
Paul Nazareth
Sara Neely
Jill Nelson
DeWayne Osborn
Doug Puffer
Bob Strachan

Government Relations Committee

Grant Monck – Chair
Malcolm Burrows
Terrance Carter
Elena Hoffstein
Robert Kleinman
Brenda Lee-Kennedy
Janice Loomer Margolis
Ruth MacKenzie
Susan Manwaring
Margaret Mason
Jill Nelson
Brad Offman
Michelle Osborne
Laila Pirbhai
Jo-Anne Ryan
Amanda Stacey
Slivia Ugolini
Ross Young

Membership Committee

Conor Tapp – Chair
Yolanda Benoit
Clare Levy
Jen Pederson
Paul Nazareth
Jessica Thirgood



I truly value my CAGP membership as it has allowed me to connect with a wonderful community of committed professionals who share my passion for philanthropy and planned giving. It has also allowed me to hone and further my skills and knowledge in the area of philanthropic tax planning by obtaining my MFA-P™ designation. The formal structure and relevant content provided by the MFA-P™ course of study, has filled a big knowledge gap that existed for financial advisors and anyone seriously interested in philanthropic tax planning.

TINA TEHRANCHIAN, MA,
CFP®, CLU®, CHFC®, MFA-P™,
FP Canada™ Fellow, Planned
Giving Consultant at The Donor
Motivation Program™



4 gratitude

from the CAGP foundation

\ˈgra-te-,tüd-,tyüd\

noun: the quality of
being thankful



from impact to gratitude!

We are immensely grateful to our donors and supporters, our volunteers and our leaders – for so many reasons! These are just a few:

we are grateful for their confidence in us.

Their belief has been key to the growth and progress of our education program. Having dedicated in-house resources has amplified our ability to deliver. In the last 12 months there have been more advisors educated, more charities and fundraising professionals trained, more donors and partners engaged, than ever before in our history! We give special thanks to Donald K. Johnson, the Donor Motivation Program, Benefaction Foundation, Lawson Foundation and Susan Manwaring for their support in making this happen.

we are grateful for their loyalty.

We've always known that CAGP members are dedicated to our cause, but their commitment is evident from our own fundraising metrics. Our donor retention rate is more than 70% - well over the industry average of 45.5%! - and over 62% of our donors give to us through recurring gifts and pledges, allowing us to plan strategically.



I'm pleased to assist the Foundation with its work. We've all benefitted professionally as members of our Association; it's important to demonstrate it, for those who follow.

IAN M. FRASER MBA, FAHP,
FCEP, Consultant in Philanthropy



4 gratitude

from the CAGP foundation

we are grateful for their vision.

One of our goals is to raise public awareness of every Canadian's ability to make a significant difference through legacy gifts. Through the generosity of far-sighted donors – the Rideau Hall Foundation, Toronto Foundation, John Blachford, Keith Thomson, Greg Lichti and an anonymous donor - we are on the cusp of launching a national behaviour change campaign, Will Power, that will demonstrate the power of gifts in wills to the general public, and accelerate a major source of funding for the charitable sector. Our own six legacy donors are an inspiration to us all!

we are grateful to our volunteers from coast to coast for the gift of their time, their talent and their treasure.

100% of the CAGP Board and the CAGP Foundation Board members are donors. We have also received support from local Chapters and we thank Greater Toronto and Greater Vancouver in particular for their generosity.

we are grateful to our leadership.

Our CAGP Foundation Board members and the additional volunteers who participate on our committees are the key to our success. The results speak for themselves: in 2019 we raised \$487,960 in gifts and pledges and our actual revenue was \$329,8456. Our endowment at The Winnipeg Foundation has grown by \$8,041 and now stands at \$24,400. Our goal is to build even more sustainability in the coming years.



Being involved with CAGP has transformed my professional life immeasurably for the better. I've found my "tribe", to quote Seth Godin, a wonderful, welcoming group of people that I am proud to serve with. I've put a gift in my will to the CAGP Foundation to make sure others can experience the same kind of transformation.

MICHELLE JOHNSON,

National Donor Relations
Manager, Wilderness Committee
and Chair, Vancouver Island
Chapter, British Columbia



4 gratitude

from the CAGP foundation



For all of this, we express our gratitude.
We could not do it without you.

Thank you!

CAGP Foundation Board

Darren Pries-Klassen – Chair

Beth Proven – Vice Chair

Andrew Valentine – Secretary

Ross Young – Treasurer

Chelsea McIntyre

Brad Offman

Andrea Robertson

Marcella Zanella

Additional Volunteers

Joan Blight

Cary Gaymond

Geoff Graham

Greg Lichti

Sara Neely

Jill Nelson

Charles O'Neil

Michelle Osborne

Doug Puffer

Keith Thomson

CAGP is not just an addition, but IS an integral part of my legacy giving career growth in Canada, from my first baby-steps at the Original Canadian Gift Planning course in 2009, to being a plenary speaker at the 2018 national conference on strategic philanthropy. I believe my volunteering is ensuring CAGP's strong presence and relevance locally, and my donations in support of the CAGP Foundation are ensuring its strong future, Canada-wide.

ALEN OKANOVIC,
Manager, Legacy Giving,
Canadian Red Cross



4 gratitude from the CAGP foundation

We're eternally grateful to our growing family of donors for demonstrating their belief in the vision we share with CAGP of a better world through strategic charitable giving.

Our 2019 Donors and Supporters

\$500,000+

Donald K. Johnson

\$50,000+

Benefaction Foundation
Rideau Hall Foundation
Toronto Foundation

\$25,000+

John Blachford
The Donor Motivation Program

\$10,000+

Lawson Foundation
Susan Manwaring
Private Giving Foundation

\$5,000+

CAGP Greater Toronto Area Chapter
Carters Law Firm
Kim Cavener
Sandra Dow
Jeremy Hampson
Greg Lichti
Ruth MacKenzie
Darren & Monika Pries-Klassen
Ross B. & Alison Young

And one donor who preferred to remain anonymous

\$2,500+

Rod Abbott
Yolanda Benoit
Blackwood Family Enterprise Services
Leah Eustace
Calvin Fong
Geoff C. Graham & James B. Tee
Peggy Killeen
Roger Lee
Tony Lee
Margaret Mason
Grant Monck
Sara Neely
Jill Nelson
Charles O'Neil
Michelle M.B. Osborne
Beth Proven
Gregory Snider
Amanda Stacey
Jasmine Sweatman
Andrew Valentine

\$1,000+

Michael Blatchford
Joan Blight
CAGP Greater Vancouver Chapter
Ian Fraser
Doug & Carla Funk
Paul & Chastity Nazareth
Heather Powers
Doug Puffer
Raymond James Canada Foundation
Christopher & Alison Richardson
Lorna Somers
Jay Stark
Conor Tapp
Marcella Zanella

\$500+

Rick & Colleen Braun-Janzen
Malcolm Burrows
Doris Cameron
Ryan Fraser
Carmela Guerriero
Linda Lindsay
Marilyn Monson
Jen Pederson
Ligia Peña
Julia Roudakova
Janice Williams

\$250+

Ninette Bishay
Florence Carey
Eli Clarke
Jacqueline Cooper
Paola Coronado Hass
Janice Feuer
Leila Fiouzi
Kathryne R. Gibson
Phil Levson & Sherry Dahl
David Love
Jackie & Kurt Markstrom
Chelsea McIntyre
Sheelagh Mercier
Brad Offman
David Woo



4 gratitude from the CAGP foundation

Our 2019 Donors and Supporters *continued*

\$100+

Cathy Auld
Penelope Burk
CAGP Ottawa Chapter
Barbara Chambers
Claude Drouin
Mia Dunn
André Franche
Deborah J. Legrove
Clare Levy
Frank Lockington
Janice Loomer Margolis
Meredith Meads
Gordon Moir
Maurice Prevost
Thomas G. Riglar
Lori Scott
Anne Thibodeau
Silvia Ugolini
Jennifer Walsom
Anne Marie Watson
Leona Yez

Up to \$100

Kate Bake-Paterson
Renee Beneteau
CAGP London Chapter
Joan Cosby
Lorraine Decock
Colleen DeJager
Simona Dobransky
Denise Fernandes
Liza Fernandes
Rory Green
Mary Hamilton
Brenda McEachern Keen
Irma McKenzie
Mitch Miller
Jenny Mitchell
Alen Okanovic
Ana Plotnicoff
Janice St-Denis
Ingrid Tsui
Stephen Webb
Jessica Wroblewski

Legacy Donors

Michelle Johnson
Ruth MacKenzie
Chelsea McIntyre
Paul C.S.C. Nazareth
Beth Proven
Keith Thomson

5 the money

	National Office	Chapters	CAGP Foundation	Total 2019	Total 2018
REVENUE					
Conference	\$ 520,181	\$ -	\$ -	\$ 520,181	\$ 411,197
Membership fees	299,890	-	-	299,890	298,297
Education courses	-	-	272,658	272,658	295,085
Leave A Legacy sponsorships	-	274,403	-	274,403	229,679
Donations	-	-	261,873	261,873	204,614
Chapter events	-	79,973	-	79,973	74,094
Job postings	33,000	-	-	33,000	32,738
Sponsorships	-	17,375	-	17,375	25,995
Interest and other	30,971	8,856	-	39,827	15,194
	\$ 884,042	\$ 380,607	\$ 534,531	\$ 1,799,180	\$ 1,586,893
EXPENSES					
Salaries and benefits	\$ 302,580	\$ -	\$ 216,812	\$ 519,392	\$ 445,401
Conference expenses	425,573	-	-	425,573	356,303
Leave a Legacy	-	256,415	-	256,415	196,180
Meals, travel and accommodation	34,657	-	95,892	130,549	155,172
Administration	60,192	43,683	20,584	124,459	129,435
Chapter events	-	100,511	-	100,511	89,267
Professional fees	50,197	-	24,571	74,768	88,057
Will Power Legacy Campaign	-	-	56,661	56,661	-
Fundraising	-	-	50,919	50,919	19,510
Rent	23,548	-	14,665	38,213	37,457
Memberships and honorariums	7,486	-	27,222	34,708	31,285
	\$ 904,233	\$ 400,609	\$ 507,326	\$ 1,812,168	\$ 1,548,067
NET REVENUE (EXPENSES) BEFORE INTER-FUND TRANSACTIONS	\$ (20,191)	\$ (20,002)	\$ 27,205	\$ (12,988)	\$ 38,826
Management fee	\$ 74,500	-	(74,500)	-	-
Contributions from Chapters to CAGP Foundation	-	(6,300)	6,300	-	-
Chapter grants	(30,175)	30,175	-	-	-
Conference bursaries	17,112	(17,112)	-	-	-
NET REVENUE (EXPENSES) FOR THE YEAR	\$ 41,246	\$ (13,239)	\$ (40,995)	\$ (12,988)	\$ 38,826



CAGP is a great organization that has played an important role in both my personal career and my professional practice. As part of the Government Relations Committee, we have worked together to be a critical voice advocating for tax policy and legislation that is favourable to charitable giving and estate planning, something that is very important to me. The charity and advisor colleagues I have worked with through CAGP have become one of my most essential career networks, ultimately enabling me to be a better lawyer providing better service to my clients.

ELENA HOFFSTEIN,
Lawyer at Miller Thomson LLP



6 our people

LAURIE FOX

Director, National Legacy Campaign

DELANEY JACKSON

Executive Assistant & Office Coordinator

PEGGY KILLEEN

Development Director, CAGP Foundation

LARA KINNEAR

Education & Conference Assistant

ERIN KUHNS

Manager, Education & Training

CLARE LEVY

Communications & Stakeholder Relations Specialist

RUTH MACKENZIE

President & CEO, CAGP / Executive Director, CAGP Foundation

PAUL NAZARETH

Vice-President, Education & Development

JESSICA THIRGOOD

Coordinator, Membership & Development

SHARON TORLEY

Finance Manager

If a person decides to establish a career in the charitable sector, they will quickly realize they need the CAGP for career development. Fundraisers are in a relationship business and need to connect with fellow peers in many ways, for a variety of reasons. For the price of a CAGP membership, you receive an amazing number of benefits; the greatest of which is connectivity with fellow members at all levels of the career spectrum. I am proud of my long-term association with CAGP. The organization means a great deal to me and I hope at the end of my career, I have represented it well.

RICKY PIEDRAHITA,

Senior Gift Planner, The Salvation Army and Chair, Niagara Golden Horseshoe Chapter, Ontario