



You are reading this case for support because you believe in the power of philanthropy, and because you also believe in the power that **strategic charitable giving** has to amplify it. You share our vision of *a better world through strategic charitable giving*. You know that it is possible to create greater impact by connecting people's passions and their desire to make a difference with the most effective way of doing so; allowing them to maximize their generosity so that they can give more and create a lasting legacy.

### **BUILDING A BETTER WORLD TOGETHER**

As Canadians, we are proud to belong to a caring country; it's an important part of our identity. We've achieved great things from coast to coast despite our sheer size and relatively small population. In large part, this was accomplished by the desire of many Canadians to give back; matching their philanthropic goals with the missions of organizations that benefit our people and our society.

It helps that Canada has one of the most generous tax systems in the world when it comes to supporting charitable giving. There is no doubt that giving comes from the heart, but gifts of securities, life insurance, or gifts in a will, enable Canadians to give more to charities and also have a positive effect on their financial and estate plans. It's a synergy that creates greater impact.

### **THIS IS STRATEGIC CHARITABLE GIVING**

Across the country there are countless professionals who know how strategic charitable gift planning can benefit charities, as well as how it can enhance donor satisfaction, through the increased investment that strategic planning of gifts has facilitated. Many of us work for charities to raise funds, and a growing number provide professional counsel as lawyers, financial planners, insurance brokers, accountants and philanthropic advisors; helping clients with their philanthropic decision-making.

### **THE POWER OF EDUCATION**

A large number of us have honed our skills and gained much of our knowledge and expertise about strategic charitable giving from the education and training delivered by the Canadian Association of Gift Planners (CAGP). It's a best-in-class program that continues to evolve and grow. The education of gift planning professionals across the country has produced a corps of highly competent and committed people who are passionate about their work; having an impact on donors, empowering them to give even more.

Those of us who work in the charitable sector are able to show donors the best ways to make significant gifts to support change and transform society. And those of us who are professional advisors enable our clients to make powerful choices about their philanthropy; choices which reflect their values and allow them to be as strategic as possible in their giving.

### **INSPIRING A CULTURE OF GIVING**

Providing leadership and a strong voice for tax policy that supports charitable giving in Canada has also had a major impact on Canadians' giving. It is in large part the reason Don Johnson, a generous philanthropist and tireless advocate for charitable giving, last year chose to make a leadership gift of \$500,000 (over 5 years) to the CAGP Foundation.

## **THE NEED TO SUPPORT EXCELLENCE**

CAGP is now at a crossroads. Without the growth in resources to match it, the demand for development at the local level, educational offerings and government relations work has continued to rise, as primary revenue comes from membership fees. The need for an injection of funds has become urgent. The CAGP Foundation was created to address this need.

## **OUR GOALS**

- We aim to customize and expand the scope of educational outreach to meet market demand; integrated among the various professional disciplines. We seek to build the capacity of our faculty to make the excellence of CAGP's best-in-class program accessible to the broadest possible audience.
- We aim to build and develop our networks around the country; investing in the development of local leaders and stakeholders; amplifying the potential of philanthropy to have an impact on local communities.
- We aim to continue to champion a tax and legislative environment in Canada which is favourable to philanthropy. It's a crucial component of building a nationwide practice of strategic charitable giving.
- We aim to raise public awareness of every Canadian's ability to make a significant difference through legacy gifts. There is still much to do. Vitalizing the Leave a Legacy movement has the potential to significantly advance this area of philanthropy.

In short, we want to ensure that the strategic charitable giving movement continues to grow and get stronger; allowing us to support the critical missions and visions of charitable organizations and ultimately strengthening our society. *We are in the best position to make all of this happen.*

## **BUILDING ON OUR SUCCESS - SUSTAINING OUR FUTURE**

The level of the support the CAGP Foundation received in its first year of existence sent a clear "this is a cause whose time has come" message. We're deeply grateful to our Founding Donors for demonstrating their belief in our vision.

Now the hard work really begins! We need to maintain that momentum and build on that success. Securing consistent funding will help transform the work we do in Canada. The focus of our attention and efforts is on sustainability; continuing to grow the number of multi-year pledges and asking for leadership gifts. This will allow us to plan a strategic long-term, viable, and sustainable program.

To be in a position for maximum impact, our goal is to raise \$365,000 annually. If you would like to talk to us about specific funding initiatives, please let us know.

## **BECOME A BUILDER**

We ask you to join the movement and consider making a three- to five-year pledge to the CAGP Foundation. Your investment in building our sustainability will embolden us to continue on this new and exciting road. It's a journey that we are certain will enable more Canadians to give even more to the communities and causes they care deeply about, and ultimately we will all be the better for it.

## OUR IMPACT

Our first year of raising funds yielded significant results and has already had an impact on strategic charitable gift planning in Canada. We had tremendous support from CAGP's members and stakeholders, including a significant multi-year pledge. We can now start to invest in our heightened focus of advancing education for charity gift planners and professional advisors in Canada.

The Foundation has engaged contractually with CAGP to deliver an education program with newly developed curriculum specifically targeting professional advisors. The program has been able to expand its staff to include a new Vice President, Education & Development and is currently expanding its education market to deliver in more communities, to more organizations, and with new stakeholder audiences, such as financial advisors, CPAs and lawyers.

The CAGP Foundation's leadership in education has made it possible for CAGP to direct much needed resources towards its strategic activities. These initiatives include supporting CAGP's local Chapters so that they can build capacity in their communities, and finding opportunities to engage in impactful government relations in public policy on philanthropy.

In 2016, CAGP's strategic plan drew attention to the organization's constraints attributed to a deficiency in human and financial resources. That plan, "Building Our Future", pointed to the urgency of establishing the CAGP Foundation. As CAGP embarks on a new strategic process, the early success of the CAGP Foundation ensures that this new plan will optimize greater strength and capacity. We will be closer to reaching CAGP's and the CAGP Foundation's shared vision of *a better world through strategic charitable giving*.

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