verb: have a strong effect on someone or something
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, CFRE - Chair
Heather Powers - Vice Chair
Amanda Stacey - Past Chair
Ninette Bishay, CPA, CA - Treasurer

Ruth MacKenzie, CPA, CA - Treasurer
Geoff Graham, CFRE - Secretary
Yolanda Benoit
Michael Blatchford
Jill Nelson, CFRE

Beth Proven
Conor Tapp
Keith Thomson

- with thanks to the CAGP Board -
2019 impact

1,780 people participated in courses and webinars

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

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!

19 committee members

24 years of strategic government relations work

CAGP FOUNDATION

6 legacy donors

100% CAGP Board Members & Foundation Board Members are donors

$487,960 raised in gifts and pledges

646 professional advisors engaged with us

Tea consumed at the CAGP office = ∞

CAGP Board Members & Foundation Board Members are donors

$487,960 raised in gifts and pledges

6 legacy donors

100% CAGP Board Members & Foundation Board Members are donors

22 cities, towns, communities visited in 2019

INTRODUCED A NEW 5YR STRATEGIC PLAN, SETTING THE STAGE FOR OUR FUTURE IMPACT!

OUR BIGGEST CONFERENCE YET!

507 attendees

#CAGP19 reached 328,100 people

6 legacy donors

100% CAGP Board Members & Foundation Board Members are donors

$487,960 raised in gifts and pledges

6 legacy donors

100% CAGP Board Members & Foundation Board Members are donors

22 cities, towns, communities visited in 2019

INTRODUCED A NEW 5YR STRATEGIC PLAN, SETTING THE STAGE FOR OUR FUTURE IMPACT!

OUR BIGGEST CONFERENCE YET!

507 attendees

#CAGP19 reached 328,100 people
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  
Allyson Dahl  
Kate Donahue  
Don Gordon  
Yvette Guigeno  
Lucy Hough  
Jennifer Jasechko  
Laurie Palmer  
Kaila Pilecki

**Alberta North**
Leona Yez – Chair  
Jaime Cordoba  
Laura Gadowsky  
Darlene Kowalchuk  
Randy Liedtke  
Matt Mandrusiak  
Deborah McKinnon  
Barb Noble  
Sherry Schaefer  
Christy Soholt  
Laura Svajlenko  
Leisa Tarr

**Chatham-Kent**
Lisa Caron – Chair  
Brad Davis  
Jodi Maroney  
Margery Muharrem  
Anne Taylor

**Ottawa**
Mitch Miller – Chair  
Paul Brousseau  
Megan Doyle Ray  
Nadine Fowler  
Katie Loftus  
Brian McFarlane  
Chelsea McIntyre  
Jenny Mitchell  
Maurice Prevost  
Selva Trebert Sharman

**Greater Montreal**
Kim Cavener – Chair  
Michel Beauchamp  
Gérard Briand  
Josée Darche  
Gina Di Filippo  
Susan Elias  
Samar El Soufi  
Lucille Grimard  
Jeremy Hampson  
Nancy Lepage  
Antonietta Nicolo

**London**
Justin Pilon – Chair  
Gord Baptist  
Adam Chapman  
Trish Gergich  
Sue Hardy  
Vicki Hayter  
Linda O’Connor

**Prince Edward Island**
Kent Hudson – Chair  
Helen Chapman  
Myrtie Jenkins Smith  
Rosie Shaw

**Alberta South**
Sheelah Mercier – Chair  
Heather Berezowski  
Kevin Davidson  
Susan Deike  
Karen Filbert  
Kathryne Gibson  
Rob Locke  
Neil Williams  
Ross Young  
Shirley Yurchi

**Saskatchewan North**
Stacey Schewaga – Chair  
Vicki Corbin  
Jen Pederson  
Trina Mortson  
Jay Stark

**Greater Toronto Area**
Serena Hak – Chair  
Marisa Barlas  
Mihalk Bornstein  
Jackie Cooper  
Janice Correa  
Sandra Dow  
Becky Fallis  
Abdesh Furmah  
Tammy Garcia  
Anel Gokhale  
Ann Gorwill  
Karen Hudson  
Daniel Kachani  
Winsor Pepall

**Saskatchewan South**
Trina Owens – Chair  
Ticia Heward  
Kurtis Krug  
Jeff Norwig  
Leanne Posehn  
Crystal Schmalle  
Kaela Strain

**Waterloo-Wellington**
Jessica Wrobleski – Chair  
Heather Curran  
Rubin Kataki

**Newfoundland & Labrador**
Mike Kidney – Chair

**Kamloops**
Allisa Coquet – Co-Chair  
Sarah Sandholm – Co-Chair  
Danalee Baker  
Margaret Chrumka  
Nena Jocic-Andrejevic  
Shelby Lomas

**Sarnia-Lambton**
Jane Anema – Chair

**Ottawa**
Mitch Miller – Chair  
Paul Brousseau  
Megan Doyle Ray  
Nadine Fowler  
Katie Loftus  
Brian McFarlane  
Chelsea McIntyre  
Jenny Mitchell  
Maurice Prevost  
Selva Trebert Sharman

**Greater Montreal**
Kim Cavener – Chair  
Michel Beauchamp  
Gérard Briand  
Josée Darche  
Gina Di Filippo  
Susan Elias  
Samar El Soufi  
Lucille Grimard  
Jeremy Hampson  
Nancy Lepage  
Antonietta Nicolo

**Prince Edward Island**
Kent Hudson – Chair  
Helen Chapman  
Myrtie Jenkins Smith  
Rosie Shaw

**Nova Scotia**
Lori Scott – Chair  
Sara Burke  
Doris Cameron  
Toni Croft  
Siobhan Doherty  
Liz Finney  
Jenna Joyce  
John MacDonald  
Aileen Stevens

**Windsor & Essex County**
Patricia Valleau – Chair  
Lisa Kolody  
Martin Sobocan  
Kim Willis

**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:

**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
- Alan Okanovic
- Charles O’Neil
- Lydka Potocnik
- Heather Powers
- Marcella Zanella

**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
- Laili Pirbhai
- Jo-Anne Ryan
- Amanda Stacey
- Silvia Ugolini
- Ross Young

**Membership Committee**
- Conor Tapp – Chair
- Yolanda Benoit
- Clare Levy
- Jen Pederson
- Paul Nazareth
- Jessica Thiggood

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

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.
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
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
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
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

$500+
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
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
Ailen 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

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

<table>
<thead>
<tr>
<th>Revenue</th>
<th>National Office</th>
<th>Chapters</th>
<th>CAGP Foundation</th>
<th>Total 2019</th>
<th>Total 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference</td>
<td>$520,181</td>
<td>-</td>
<td>-</td>
<td>$520,181</td>
<td>$411,197</td>
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<tr>
<td>Membership fees</td>
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<td>-</td>
<td>-</td>
<td>299,890</td>
<td>298,297</td>
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<tr>
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<td>-</td>
<td>274,403</td>
<td>-</td>
<td>274,403</td>
<td>229,679</td>
</tr>
<tr>
<td>Leave A Legacy sponsorships</td>
<td>-</td>
<td>-</td>
<td>261,873</td>
<td>261,873</td>
<td>204,614</td>
</tr>
<tr>
<td>Donations</td>
<td>-</td>
<td>-</td>
<td>261,873</td>
<td>261,873</td>
<td>204,614</td>
</tr>
<tr>
<td>Chapter events</td>
<td>-</td>
<td>79,973</td>
<td>-</td>
<td>79,973</td>
<td>74,094</td>
</tr>
<tr>
<td>Job postings</td>
<td>33,000</td>
<td>-</td>
<td>-</td>
<td>33,000</td>
<td>32,738</td>
</tr>
<tr>
<td>Sponsorships</td>
<td>-</td>
<td>17,375</td>
<td>-</td>
<td>17,375</td>
<td>25,995</td>
</tr>
<tr>
<td>Interest and other</td>
<td>30,971</td>
<td>8,856</td>
<td>-</td>
<td>39,827</td>
<td>15,194</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$884,042</strong></td>
<td><strong>$380,607</strong></td>
<td><strong>$534,531</strong></td>
<td><strong>$1,799,180</strong></td>
<td><strong>$1,586,893</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>National Office</th>
<th>Chapters</th>
<th>CAGP Foundation</th>
<th>Total 2019</th>
<th>Total 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries and benefits</td>
<td>$302,580</td>
<td>-</td>
<td>-</td>
<td>$319,392</td>
<td>$445,401</td>
</tr>
<tr>
<td>Conference expenses</td>
<td>425,573</td>
<td>-</td>
<td>-</td>
<td>425,573</td>
<td>356,303</td>
</tr>
<tr>
<td>Leave a Legacy</td>
<td>-</td>
<td>256,415</td>
<td>-</td>
<td>256,415</td>
<td>196,180</td>
</tr>
<tr>
<td>Meals, travel and accommodation</td>
<td>34,657</td>
<td>43,683</td>
<td>-</td>
<td>95,929</td>
<td>155,172</td>
</tr>
<tr>
<td>Administration</td>
<td>60,192</td>
<td>-</td>
<td>20,584</td>
<td>130,549</td>
<td>129,435</td>
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<tr>
<td>Chapter events</td>
<td>-</td>
<td>100,511</td>
<td>-</td>
<td>100,511</td>
<td>89,267</td>
</tr>
<tr>
<td>Professional fees</td>
<td>50,197</td>
<td>-</td>
<td>24,571</td>
<td>74,768</td>
<td>88,057</td>
</tr>
<tr>
<td>Will Power Legacy Campaign</td>
<td>-</td>
<td>-</td>
<td>56,661</td>
<td>56,661</td>
<td>-</td>
</tr>
<tr>
<td>Fundraising</td>
<td>-</td>
<td>-</td>
<td>50,919</td>
<td>50,919</td>
<td>19,510</td>
</tr>
<tr>
<td>Rent</td>
<td>23,548</td>
<td>-</td>
<td>14,665</td>
<td>38,213</td>
<td>37,457</td>
</tr>
<tr>
<td>Memberships and honorariums</td>
<td>7,486</td>
<td>-</td>
<td>27,222</td>
<td>34,708</td>
<td>31,285</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$904,233</strong></td>
<td><strong>$400,609</strong></td>
<td><strong>$507,326</strong></td>
<td><strong>$1,812,168</strong></td>
<td><strong>$1,548,067</strong></td>
</tr>
</tbody>
</table>

**Net Revenue (Expenses) Before Inter-Fund Transactions**

<table>
<thead>
<tr>
<th>National Office</th>
<th>Chapters</th>
<th>CAGP Foundation</th>
<th>Total 2019</th>
<th>Total 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management fee</td>
<td>$74,500</td>
<td>-</td>
<td>(74,500)</td>
<td>-</td>
</tr>
<tr>
<td>Contributions from Chapters to CAGP Foundation</td>
<td>-</td>
<td>(6,300)</td>
<td>6,300</td>
<td>-</td>
</tr>
<tr>
<td>Chapter grants</td>
<td>(30,175)</td>
<td>30,175</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Conference bursaries</td>
<td>17,112</td>
<td>(17,112)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Net Revenue (Expenses)</strong></td>
<td><strong>$41,246</strong></td>
<td><strong>$13,239</strong></td>
<td><strong>$40,995</strong></td>
<td><strong>$12,988</strong></td>
</tr>
</tbody>
</table>
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.