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Dear Friends,

2015 was another busy and exciting year for CAGP, and we are enormously proud of what we have achieved.

Our strategic plan, CAGP 2013: The Next 3 Years, continued to guide us in our day-to-day work, in how we deployed our resources and in decision-making over the many opportunities at our disposal. We believe that CAGP’s position as the recognized authority on gift planning has been raised, that our education program continues to elevate professionalism and competency, that our business model is evolving and is increasingly providing the foundation to enable our future, and that we have the elements of leadership in place to support our continued transition and growth.

Enhancing and improving communication and information sharing from board to membership, from national office to local Chapters, from our organization to our broader stakeholder audience, is a persistent endeavour. Through quarterly member communiqués, our regular CAGP eNews, and sharing timely and relevant information through other communication channels, we strive to ensure our members and partners are apprised of what we’re focusing on, changing contexts and emerging issues.

As such, rather than a more fulsome year-in-review, we’re opting instead to use this Annual Report to highlight key activities, accomplishments, achievements — from our Government Relations Committee’s leadership on new estate legislation to a refreshed corporate image to exciting partnerships — so that we might, together, celebrate CAGP’s strengthened voice, profile, leadership and foundation. These achievements are not just ours to revel in. They are yours.

We’re proud of our progress and successes, but also move forward into this year and the next, balancing excitement with pragmatism. We’re hopeful that fiscal deficits are behind us, yet we remain cognizant of our ongoing resource limitations. While our Chapters are our foremost partners, we recognize the imperative to provide much-needed support. While we enjoy increased visibility, there is still enormous ground to cover. These opportunities have us motivated and enthusiastic about our future and guarantee that we will never experience the tyranny of the mundane!

In closing, we acknowledge and extend enormous gratitude to our collective of board, volunteers, staff, members, partners, stakeholders, supporters. It is only through your commitment, confidence and generosity that we are able to accomplish what we do and realize our success. Thank you.

Yours very truly,

Darren Pries-Klassen
Chair of the Board of Directors

Ruth MacKenzie
President & CEO

“CAGP has been my key professional association since 1995. Over twenty years, my career moved from law to gift planning to more general fundraising and then consulting. CAGP has been a key part of my career development all along the way. Many of my long-term professional colleagues and friendships began through my involvement with CAGP. Thank you CAGP!”

Grant Monck, LL.B., Strategic Fundraising Consultant, Grant Monck Fundraising Consultant Services
About Us

The **Canadian Association of Gift Planners** is a national association that inspires and educates the people involved in strategic charitable gift planning. We are the only Canadian professional association that brings together charitable fundraisers and professional advisors. Through our commitment to a stringent Code of Ethics, continual learning and networking, and a willingness to share, we help each other grow and develop as professionals in our respective fields.

"I am inspired by CAGP, an organization that is truly helping donors accomplish their philanthropic goals. CAGP and its members have been essential to my professional growth and I feel lucky to have access to such a dynamic networking environment. I am proud to know that together we are creating stronger communities."

Paola Coronado-Hass, Planned Giving, Development Officer, BC Cancer Foundation, Co-Chair, CAGP Greater Vancouver Chapter

Our Vision

A better world through strategic charitable giving.

Our Mission

To champion the growth and development of strategic charitable gift planning in Canada by:

- Developing knowledge and providing education
- Building awareness and promoting philanthropy
- Creating connections and facilitating partnerships
- Engaging in national dialogues and influencing public policy.
**Highlights**

We are pleased to highlight some of our most notable achievements and events, changes and turning points of 2015.

We invite you to explore our website [https://www.cagp-acpdp.org](https://www.cagp-acpdp.org) for more information on each activity.

---

**One of our most significant changes this year was the launch of a new membership model, which included an amended pricing structure to meet the diverse needs of our members and to set the stage for growth.**

A partnership with United Way-Centraide Canada continues, and new partnerships were established with Community Foundations in BC and Humber College in Toronto.

**To continue to educate the sector and allied professions on the new estate administration rules, we delivered a special webinar, *Canada’s New Estate Administration Rules: Understand; Get Ready.* With sponsorship provided by Miller Thomson, we were able to offer this webinar at no cost, not just to our members but to the sector at large, inviting Imagine Canada, the Association of Fundraising Professionals, Philanthropic Foundations of Canada and others to promote this to their members and stakeholders.

**Speaking to Finance on the new estate administration rules, our Government Relations Committee provided a written submission outlining concerns as to how the changes may adversely impact charities as well as suggestions for amendments to address those challenges. The submission opened a dialogue between the Department of Finance and CAGP that continued throughout the year.**

**The Original Canadian Gift Planning Course – aka The Banff Course – returned to Banff! Whatever you call it, 2015 saw another successful, sold-out event with attendees having, what we continue to be told is, a career-changing experience.**

---

**Our esteemed Government Relations Committee tackled new estate administration rules, slated to come into effect in January 2016. In identifying potential challenges for charities when realizing gifts from complex estates, the Committee began strategizing to ensure CAGP’s voice and the views of the sector were heard with policy makers and that gift planners and allied professionals were aware of and ready to deal with these changes.**

To raise awareness on the new estate administration rules and ensure our members could prepare for these changes, we partnered with *Gift Planning in Canada* for a February special edition dedicated to the issue, providing array of articles from expert practitioners and professionals on a variety of topics.

---

“If we didn’t have CAGP, there simply wouldn’t be the learning that there is. They are the lifeblood of the small organization. They are the go-to.”

Colleen DeJager, TEP, Director, Planned and Memorial Giving, London Health Sciences Foundation
At the end of our 2014-15 fiscal year we were “back in black”! We were celebrating big over a small surplus, after several years of deficits. At the same time, we are ever-aware of the need for ongoing fiscal prudence and continued evolution of our business model to ensure our sustainability into the future.

When the federal government released the 2015 Budget on the opening day of our Conference, we were thrilled to see it included new incentives for charitable giving, providing a capital gains exemption on gifts made from the sale of real estate and private company shares. This incentive was first proposed by CAGP in 2008 and has been tirelessly championed by Friend of CAGP, Donald K. Johnson. Follow-up media pick-up included CAGP’s perspective quoted in the Globe & Mail.

On May 14th, as part of a consortium of national organizations, CAGP participated in the first “Day on the Hill”, meeting with Senators and Members of Parliament from all parties. Representing CAGP were Darren Pries-Klassen, Chair of the Board of Directors, Malcolm Berry, Past Board Chair, Susan Manwaring, [then] Chair of the Government Relations Committee and Ruth MacKenzie, President & CEO. In total, 27 meetings were held and key messages focused on recognizing the imperative role of the sector and our vital contribution to the strength of this country. While meeting with Finance Minister Joe Oliver, Malcolm was able to emphasize CAGP’s role in recent budget provisions which support planned giving.

Following up on the successful Day on the Hill in May, CAGP as part of a collective of 9 organizations, released the Federal Platform Proposal for all political parties to consider integrating in their platforms for the October federal election. Outlining concrete action items, it called for all parties to ensure government creates an enabling environment for charities and nonprofits to respond to growing and changing community demands, and implement policies that contribute to long term financial health of charities and nonprofits, so that they can better serve communities.

In an effort to draw financial advisors to professional development on philanthropy and strategic gift planning, our one-day Gift Planning Fundamentals course was successfully accredited by The Institute for Advanced Financial Education. For the next two years, advisors taking this course will receive 8.0 continuing education credits which can be applied towards their yearly professional development requirements.

CAGP rebranded! We completely scraped off our old look and launched a new logo with a fresh new feel and colour. The new logo with three interwoven strands represents our members, networks and donors as well as the circles of giving, collaboration and knowledge. At the same time, we also moved away from the bilingual CAGP-ACPDP acronym to unilingual logos in each official languages, changed the nomenclature of our local counterpart from RoundTable to Chapter, and produced our first Annual Report.

“GIV3 is thrilled to be partnering with CAGP - working together has been a positive and rewarding experience. Their knowledge, professionalism and unparalleled commitment to growth in strategic charitable giving make them an ideal partner for us. We look forward to continuing our long-term collaboration on capacity building projects to benefit the entire charitable sector.”
Lys Hugessen, President, GIV3
Continuing our collaboration with GIV3 and Philanthropic Foundations of Canada, we followed up on our research project, The Philanthropic Conversation, undertaken with BMO Private Banking, and partnered with WealthProfessional.ca on 10 Weeks / 10 Ways: Engaging Clients in the Philanthropic Conversation. Over ten weeks from September to November we delivered a series of articles targeted to financial advisors and providing expert advice on the how-to's of supporting their clients on a philanthropic journey.

After careful consideration, CAGP's Board of Directors made the decision to not seek a continued partnership with Great-West Life as a Local Granting Sponsor for the Leave A Legacy program. The decision was made in consideration of CAGP's resource capacity and also recognizing the resource gap for national leadership and infrastructure to support the program. The decision was communicated to Great-West Life with an expression of deep appreciation for the many years of support, and subsequently delivered to our Chapter and Leave A Legacy Chairs by teleconference and to the broader membership in a Board communiqué. We remain committed to the Leave A Legacy message and will continue to retain the national brand and license. Given its grass-roots nature, know that it will continue to thrive through local Chapters, while we continue to explore opportunities for a new partnership.

As draft legislation on the new gifting provisions related to capital gains exemption on gifts of real estate and private company shares was released, interested parties were invited to provide input. CAGP's Government Relations Committee continued to ensure the perspective of charities was communicated by making a submission and identifying areas where amendments may be required to provide optimal benefit for charitable gifting.

The widely-read industry publication, Investment Executive, expressed an interest in The Philanthropic Conversation, interviewing CAGP's President & CEO, Ruth MacKenzie. The article, Charity Begins with Caring Advisors, appeared in their November issue and advised professional advisors to talk to their clients about charitable-giving options, also offering suggestions how to do so in a way that would deepen the client-advisor relationship.

Gift Planning Fundamentals was delivered in French for the first time! As a National organization, we strive to deliver messages and events in both of Canada’s official languages. This was an important milestone in our professional development portfolio and the solid turnout was inspiring. We hope to bring more events in French in the future.

Another Strategic Gift Planning Bootcamp for Major Gift Professionals was successfully delivered in Ontario, with great feedback received from attendees, praising faculty and the significant learning opportunity they have provided.

We officially launched our new website and CRM that reflect our modernized corporate image. This launch would not have happened without our National Website Partners' interest and support and we are so appreciative of their partnership and commitment to CAGP. At the same time, the launch wasn't without its challenges. We thank our members for their continued patience as we worked over the following months to iron out malfunctions, continued to review and refine content and test core functions to achieve a positive user experience for our stakeholders.

September

October
November concluded on a year-long roadshow of *The Philanthropic Conversation* and the tremendous interest in this study that demonstrates a clear business case for professional advisors to discuss philanthropy with their clients. In addition to the official launch at CAGP’s national conference in Halifax and a subsequent national webinar, presentations were carried out to the Society of Trust and Estate Practitioners (STEP) in Montreal, Carleton University’s Masters of Philanthropy and Nonprofit Leadership Program, the Nova Scotia Chapter of Advocis, the Doing Well by Doing Good Philanthropy Conference in Hamilton, and the Vancouver CAGP-Estate Planning Council. We continue to field requests into 2016 and have reports of many Chapters facilitating local presentations. The study has also opened countless doors to explore further strategic alliances.

In December we reflected on this busy and exciting 2015 and we are proud to have ended this year stronger than ever. More profile with media, new collaborations and strategic alliances, increased dialogue with government and the enactment of long-championed charitable gifting provisions all point to heightened profile and credibility of our association. We end 2015 with 1,098 members, having reached 1,468 colleagues, nationally, through our professional development offerings and with significantly more engaged social media channels. All this has us energized and enthused for what we know will be an equally exhilarating 2016.

Over the fall months we solicited input from members and stakeholders through a survey and key informant interviews as part of CAGP’s strategic planning process. This valuable feedback was fully considered as the Board of Directors and staff team engaged in a full day of deliberative dialogue, considering progress, successes and gaps in the current strategic plan and opportunities, necessities and strategies for the future. Our CEO and Board then worked hard to craft a plan for 2016-18 and to share that plan with our valued members.

Introduced with a covering letter from CAGP’s Board Chair, Darren Pries-Klassen, and President & CEO, Ruth MacKenzie, the Canadian Donor’s Guide was delivered to Canada’s 338 newly-elected Members of Parliament. We express our enormous appreciation to publisher Anderson Charters for sharing this important reference book on the charitable sector and to raise CAGP’s visibility with Canada’s elected officials.

“As a strong believer in the dreams and power of donors to make the world a better place, I truly value my membership in CAGP – an organization that offers outstanding educational programming at the National and Chapter level, and brings together both Professional Advisors and Fundraisers in support of strategic charitable giving.”

Gwen Chapman, Principal, DonorFocus 360
We are grateful for our many sponsors, funders, and partners, and we thank them for their generous support that makes our work possible.

BMO Private Banking
Bull Housser
Capacity Marketing for Charities
Carters Professional Corporation
Canadian Institute of Certified Executor Advisors
DLA Piper
The Donor Motivation Program
DonorPerfect Canada
Environics Analytics
Fasken Martineau DuMoulin LLP
GIV3
Great-West Life, London Life, Canada Life
Harvey McKinnon Associates
Johnson Insurance
Lawton Partners
Legacy Leaders
Miller Thomson LLP
Mindpath
PearTree Financial Services
PG Calc
PGrowth
Philanthropic Foundations of Canada
ProDon-Logilys
RBC Wealth Management / Philips Hager North
Investment Council
Russell House Marketing
S.T. Legacy Group
Scotia Wealth Management
SickKids Foundation
TD Waterhouse
United Way Centraide Canada
Vancouver Foundation
Wealth Professional

Sponsors
Funders
Partners

“One of the great things about CAGP is your instant connection to the philanthropic community across Canada - no other organization I belong to has the same culture of sharing. As a consultant in the industry, I am constantly surprised at how tightly knit the CAGP community is. Being a highly active member of CAGP, a frequent conference speaker and a past Chapter chair brings instant, recognizable credibility within the field. No other organization has been as important to our business.”

Ryan Fraser, CFP CIM, Owner, Quiet Legacy Planning Group Ltd

National Website Partners:

SickKids Foundation
Canadian Cancer Society – Ontario Division
The Donor Motivation Program
Mennonite Foundation of Canada
Princess Margaret Cancer Foundation
Queen Elizabeth II Health Sciences Centre Foundation
CAGP Greater Toronto Area Chapter
CAGP Alberta South Chapter
CAGP Greater Vancouver Chapter
CAGP Montreal Chapter
CAGP Manitoba Chapter
Our People

We celebrate our people as the driving force of CAGP. We are fortunate to work with visionary leadership from the Board of Directors, exceptionally committed volunteers on our national committees and working groups, Chapter Executives that keep CAGP alive in communities across this country, and a passionate national staff team dedicated to representing CAGP and serving our members.

Board of Directors

Darren Pries-Klassen
Chair
Mennonite Foundation of Canada
St. Catharines, ON

Amanda Stacey
Vice Chair
Miller Thomson LLP
Toronto, ON

Peggy Killen
Secretary
Royal Victoria Hospital Foundation
Montreal, QC

Malcolm Berry
Past Chair
SickKids Foundation
Toronto, ON

Ross Young
Treasurer
Secure Capital Management Ltd.
Calgary, AB

Norma Cameron
The Narrative Company
Victoria, BC

Carla Funk
Executive Consultant
Victoria, BC

Beth Proven
Children’s Hospital Foundation of Manitoba
Winnipeg, MB

Doug Puffer
Simon Fraser University
Burnaby, BC

Keith Thomson
The Donor Motivation Program™
Toronto, ON
Friends of CAGP

Every year the CAGP Board presents the Friend of CAGP Award to individuals who embody the vision and spirit of CAGP, have made a contribution to the field which has made an impact on a national scale and demonstrate a high regard for the professions involved in strategic charitable gift planning. In 2015 the recipients of this prestigious Award were:

<table>
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<th>National Volunteers</th>
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<tr>
<td>Heather Berezowski</td>
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<td>Malcolm Berry</td>
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<td>Carey Bornn</td>
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<td>Malcolm Burrows</td>
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<td>Norma Cameron</td>
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<td>Helen Chapman</td>
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<td>Gwen Chapman</td>
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<td>Marie-Anne Desjardins</td>
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<td>Carla Funk</td>
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<td>Mark Goldbloom</td>
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<td>Elena Hoffstein</td>
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<td>Jennifer Jasechko</td>
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<td>Peggy Killeen</td>
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<td>Robert Kleinman</td>
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<td>Jodi Larmour</td>
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<td>Brenda Lee-Kennedy</td>
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<td>Alain Lévesque</td>
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<td>Rob Locke</td>
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<td>Tania Loftsgard</td>
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<td>Janice Loomer Margolis</td>
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<td>Susan Manwaring</td>
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<td>Margaret Mason</td>
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<td>Sue McIntosh</td>
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<td>Sheelagh Mercier</td>
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<td>Grant Monck</td>
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<td>Elizabeth Moxham</td>
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<td>Paul Nazareth</td>
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<td>Jill Nelson</td>
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<td>Cindy Neufeld</td>
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<td>Brad Offman</td>
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<td>Alen Okanovic</td>
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<td>Charles O’Neil</td>
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<td>DeWayne Osborn</td>
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<td>Michelle Osborne</td>
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<td>Nancy Parker</td>
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<td>Linda Pearson</td>
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<td>Laily Pirhbai</td>
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<td>Darren Pries-Klassen</td>
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<td>Beth Proven</td>
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<td>Doug Puffer</td>
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<td>Michelle Regal</td>
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<td>Christopher Richardson</td>
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<td>Jo-Anne Ryan</td>
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<td>Brian Shea</td>
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<tr>
<td>Amanda Stacey</td>
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<td>Bob Strachan</td>
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<td>Dee Dee Sung</td>
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<td>Keith Thomson</td>
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<td>Silvia Ugolini</td>
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<tr>
<td>Ann Vessey</td>
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<tr>
<td>Shelley Waite</td>
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<tr>
<td>Janice Williams</td>
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<td>Ross Young</td>
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Roger Lee, LL.B

Michelle Osborne, CFRE

“Working with the CAGP members has given me more purpose and meaning in my business. I am now partnering with other CAGP members to make a difference in our community by helping people make a bigger charitable imprint.”

Glenn Stewardson, CFP, FMA - The Donor Motivation Program

National Staff

Ruth MacKenzie, President & CEO

Lara Kinnear, Executive Assistant and Membership Coordinator

Erin Kuhns, Professional Development Coordinator

Jean-Marie Niangor, CPA, CMA, Financial Manager

Anastasia Smolentseva, MComm, Manager, Communications & Stakeholder Relations

Leadership Message  About Us  Highlights  Sponsors, Funders, Partners  Our People  Financial Health  Connect with Us
Chapter Executives

**Vancouver Island**
Shamim Pirani, Chair
Laurie Palmer, Leave a Legacy Chair
Cheryl Hebb
Jennifer Jasechko
Amber Adams
Don Gordon
Gwen Chapman
Sarah Millard
Joanna Verano
Sara Neely

**Greater Vancouver**
Jocelyn Anderson, Co-Chair
Paola Coronado Hass, Co-Chair
Julia Roudakova, Leave a Legacy Chair
Michelle Bernard
Calvin Fong
Jerry Halma
Robert Gagliano
Dee Dee Sung
Esther Jang
Susan McAlevy
Jane Westheuser
Linda Ashton
Lisa Haydl
Raman Johal
Yolanda Benoit

**Alberta North**
Terry Tobin, Co-Chair
Sherry Schaefer, Co-Chair
Colette Mandin, Leave a Legacy Chair
Mien Jou
Darlene Kowalchuck
Noel Xavier
Donna Roth
Laura Svajlenko

**Alberta South**
Robert Locke, Chair
Carla Gervais, Leave a Legacy Chair
Cindy Neufeld
David Beavis
Carey Bonn
Rizwan Nathoo
Kathryne Gibson
Tara Friesen
Laurie Wallis
Michelle Regal

**Saskatchewan North**
Vicki Corbin, Chair
Trina Mortson, Leave a Legacy Chair
Melissa Mann

**Saskatchewan South**
Christina Attard, Chair
Kaleta Strain, Leave a Legacy Chair
Byron Troth
Sharon Kremeniuk
Trina Owens
Kevin Peyson
Leanne Posehn

**Manitoba**
Rena Molinari, Chair
Stephen Webb, Leave a Legacy Co-Chair
Lynda Ruban, Leave a Legacy Co-Chair
Jackie Markstrom
Kathyrene Cardwell
Sarah Crowly
Liz Kovach
Patrick O’Connor
Pat Lilley
Krislyn Gutierrez

**Waterloo-Wellington**
Marjorie Brown, Chair
Darren Sweeney, Leave a Legacy Chair
Craig Stevenson
Heather Curran
Lisa Short

**Chatham-Kent**
Jodi Maroney, Chair
Jon Quaglia, Leave a Legacy Chair
Michele Grzebien-Huckson
Hugh Logan
Karen Kirkwood-Whyte

**Niagara/Golden Horseshoe**
Tamara Coleman-Lawrie, Chair
Devon Rowan, Leave a Legacy Chair
Sandra Baker
Lisa Gonnering
Julie Powell
Erin Matthews
Ashley Davidson
Sarah McPherson
Deanna Pope
Marla Smith
Gena Dureault

**Sarnia-Lambton**
Robert Murray, Co-Chair
Gus Mumby, Co-Chair
Heather Allen
Jane Anema

**London**
Don Cameron, Chair
Trish Gerich, Leave a Legacy Chair
Lisa Mazurek
Jennipher Cahill
Jill Osborne
Susan Mitchell
Melissa Derbyshire

**Windsor and Essex County**
Nancy Parker, Chair
Tim Jones, Leave a Legacy Chair
Jody Maskery
Kim Willis
Martin Sobocan

**Windsor and Essex County**
Nancy Parker, Chair
Tim Jones, Leave a Legacy Chair
Jody Maskery
Kim Willis
Martin Sobocan

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Greater Toronto
Sandra Dow, Chair
Angela D’Aversa, Leave a Legacy Chair
Peter Ramsay, Leave a Legacy Chair, Temiskaming
Marcella Zanella
Frances Buczko
Aruna Aysola
Marisa Barlas
Serena Hak
Meredith Meads
Emelita Ervin
Don Allen
Ann Gorwill
Jessica Rode
Alanna Jones

Ottawa
Neil Leslie, Chair
Katie Loftus, Leave a Legacy Co-Chair
Jana Lee Rand, Leave a Legacy Co-Chair
Paul Brousseau
Joanna Luciano
Marissa Crouetteau

Nova Scotia
Doris Cameron, Chair
Bonnie Boyd-Reed, Leave a Legacy Chair
Lori Scott
Sharon Crowe
Crystal Aboud
Ann Vessey
Katharine Berrington
Toni Croft
Alyssa Feir
Leslie Tinkham

Prince Edward Island
Helen Chapman, Chair
Myrtle Jenkins Smith
Rosie Shaw

Newfoundland and Labrador
Catherine Barrett, Chair
Malcolm Sheppard, Leave a Legacy Co-Chair
Roderick Fequet, Leave a Legacy Co-Chair

“Becoming a member of CAGP is one of the best things I've ever done to enhance my career. CAGP has provided the most comprehensive and focused education to learn more about gift planning in Canada. The conferences and workshops offered are second to none. Through my Chapter, I have also been able to connect with many local professional advisors and other planned giving professionals through the many seminars and networking opportunities they deliver. CAGP helped me help my donors make more informed choices about giving to the University. The connections I've made through CAGP are stronger than any others I've had in my professional life and I look forward to making many more.”

Nancy Parker, Chair, CAGP Windsor-Essex Chapter,
Former Manager Campaign Operations and Special Projects, University of Windsor
Financial Health

We are pleased to present our summary financial statements for the year February 1–December 31, 2015, which were audited by McCay Duff LLP. The detailed auditor’s report is available at www.cagp-acdpdp.org/annual-reports.

### Revenue

<table>
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<tr>
<th></th>
<th>2015 (11 Months)</th>
<th>2014/15 (Restated)</th>
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<tbody>
<tr>
<td>Conference fees</td>
<td>$334,940</td>
<td>$343,959</td>
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<td>Membership fees</td>
<td>283,470</td>
<td>285,261</td>
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<td>Education courses</td>
<td>172,643</td>
<td>183,365</td>
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<td>Grants</td>
<td>75,000</td>
<td>95,000</td>
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<td>Sponsorships</td>
<td>54,741</td>
<td>57,009</td>
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<td>Job postings</td>
<td>18,390</td>
<td>19,000</td>
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<tr>
<td>Interest and other</td>
<td>16,339</td>
<td>12,438</td>
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<tr>
<td></td>
<td><strong>955,523</strong></td>
<td><strong>996,032</strong></td>
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### Expenses

<table>
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<tr>
<th></th>
<th>2015 (11 Months)</th>
<th>2014/15 (Restated)</th>
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<tbody>
<tr>
<td>Salaries and wages</td>
<td>318,554</td>
<td>292,239</td>
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<td>Conference expenses</td>
<td>231,095</td>
<td>259,721</td>
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<td>Administration</td>
<td>43,258</td>
<td>35,318</td>
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<tr>
<td>Partner fees</td>
<td>41,147</td>
<td>65,968</td>
</tr>
<tr>
<td>Education and honorariums</td>
<td>32,404</td>
<td>28,466</td>
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<tr>
<td>Professional fees</td>
<td>32,253</td>
<td>21,222</td>
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<tr>
<td>Website and computer</td>
<td>31,999</td>
<td>23,489</td>
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<tr>
<td>Travel</td>
<td>25,895</td>
<td>19,408</td>
</tr>
<tr>
<td>Rent</td>
<td>20,900</td>
<td>23,200</td>
</tr>
<tr>
<td>Accommodation</td>
<td>20,488</td>
<td>14,420</td>
</tr>
<tr>
<td>Meals</td>
<td>19,133</td>
<td>28,595</td>
</tr>
<tr>
<td>Management fees</td>
<td>12,681</td>
<td>51,041</td>
</tr>
<tr>
<td>Translation</td>
<td>10,246</td>
<td>6,847</td>
</tr>
<tr>
<td>Telephone and fax</td>
<td>9,268</td>
<td>11,824</td>
</tr>
<tr>
<td>Printing</td>
<td>7,847</td>
<td>3,530</td>
</tr>
<tr>
<td>Meeting facilities</td>
<td>4,164</td>
<td>1,232</td>
</tr>
<tr>
<td>Amortization</td>
<td>2,859</td>
<td>3,230</td>
</tr>
<tr>
<td>Financial professionals research project</td>
<td>-</td>
<td>22,500</td>
</tr>
<tr>
<td></td>
<td><strong>864,191</strong></td>
<td><strong>912,250</strong></td>
</tr>
</tbody>
</table>

**Revenue (Expenses) - National Office**

<table>
<thead>
<tr>
<th></th>
<th>2015 (11 Months)</th>
<th>2014/15 (Restated)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>91,332</td>
<td>83,782</td>
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</tbody>
</table>

### Other

<table>
<thead>
<tr>
<th></th>
<th>2015 (11 Months)</th>
<th>2014/15 (Restated)</th>
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</thead>
<tbody>
<tr>
<td>Chapter revenue</td>
<td>225,175</td>
<td>466,419</td>
</tr>
<tr>
<td>Chapter expenses</td>
<td>385,425</td>
<td>452,170</td>
</tr>
<tr>
<td></td>
<td><strong>(160,250)</strong></td>
<td><strong>14,249</strong></td>
</tr>
</tbody>
</table>

**Net Revenue (Expenses) for the Year**

<table>
<thead>
<tr>
<th></th>
<th>2015 (11 Months)</th>
<th>2014/15 (Restated)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>$ (68,918)</strong></td>
<td><strong>$ 98,031</strong></td>
</tr>
</tbody>
</table>
“Taking the decision to become a member of CAGP has been one of the most important steps I have taken to enhance my network and create professional relationships, learn best practices, capture new ideas, and brainstorm with key achievers in strategic charitable giving. This professional association has been an essential resource to learning beyond my primary exposure to strategic charitable giving where I have met challenges with the knowledge that I am supported as I take risks.”

Kim Cavener, Manager of Legacy Gifts, McGill University Health Centre Foundation