



*Most CAGP members agree that networking and making connections with one another is not just one of its most valuable benefits – it’s priceless. One of the reasons is that our membership is unique in its diversity. No other professional association offers the same opportunity for fundraisers, financial and legal professionals from all over Canada to meet and exchange their knowledge and expertise.*

*Here are some thoughts from Ryan Fraser, a financial planner specialising in philanthropy, about what this precious commodity has meant to him.*

Recently, I was having a conversation with **Peggy Killeen** of the Royal Victoria Hospital Foundation in Montreal, about the general direction of planned giving, and the future of the **Canadian Association of Gift Planners**. It’s an organization with which both of us have been deeply involved for some time. Peggy, in her usual thoughtful way, challenged me by asking, “What is it about being a member of CAGP that you find most valuable?”

The answer I gave her, to quote Peggy, was quite passionate, and not necessarily what one might expect from a professional advisor such as myself.

I didn’t fully understand the special nature of CAGP until I attended my first national conference. I had been active for years on the London Roundtable, but had never taken the opportunity to attend the conference until it was held in Toronto in 2011. I haven’t missed one since, and also enjoy the opportunity to present a talk every couple of years as well.

As a Certified Financial Planner (CFP) professional, I’m used to conferences. Unfortunately, most of the time they involve me being highly uncomfortable - I’m tall and lanky which is a frame not designed to sit still in chairs for three days and listen to people talk! But at the CAGP conference in Toronto I was blown away by the fact that this was the first conference I had ever attended where you could literally sit down at any table, introduce yourself, and develop a new relationship in a matter of minutes. I’d never met a more sociable and friendly group of people in my life. I’d also never experienced the particular level of uninhibited knowledge sharing that went on, both formally and informally, at the conference. It was truly remarkable. That level of openness is relatively rare, particularly when you work in a highly competitive field.

The mood of it is best summed up by lawyer and previous chair of the CAGP Board, **Roger Lee**. A few years ago, at the Victoria conference, Roger was announcing the “Friend of CAGP Award”. That year’s recipient, **Greg Lichti** of the Princess Margaret Cancer Foundation, couldn’t actually get up to the stage because too many people were stopping him and giving him hugs on the way. Roger leaned into the microphone, mimed a hug, and said, “If this was a legal conference, and someone approached you in this way, there’d be a subpoena in one hand, and a dagger in the other! What a great organization this is.” We all laughed. I agreed with him wholeheartedly, as did everyone else in the room.

I’m often struck by how small the planned giving community in Canada is, despite our large geographic area. A few years ago, I licensed the rights to the Donor Motivation Program, a



“planned giving event in a box”. It’s a program developed originally in Pittsburgh by Scott Keffer, and brought to Canada by my friend **Keith Thomson** of Stonegate Private Counsel in Toronto. A small group of us work with selected charities across the country. One of my potential clients called a CAGP contact literally on the other side of the country, to ask how the program was working for them. They then called two more CAGP members in two different areas of the country....and I found out after the fact.

I’ve done something on those lines myself – I had a client who wanted to donate to his alma mater and, thanks to CAGP, I knew exactly who to put him in touch with instantly. In my business, that’s an unbelievable level of customer service which I doubt other financial advisors in my city could provide. Best of all, my client perceived, I’m sure (or at least I hope he did!), that it was amazing that I would know the right person that he needed to talk to right away; and without having to do research, was able to call them right in front of him less than 30 seconds after he had asked the question.

For me, it was a great reminder of how important CAGP is, and how important making connections at the national level is for all of us. So, if you haven’t had a chance to make it to the national conference, I’d love to see you in Vancouver in April – and by all means, please sit down at my table and introduce yourself!



*Ryan Fraser, CFP, CIM is a financial planner specializing in philanthropy, and Director, Business Development for Freedom 55 Financial, in London, Ontario. He is a past chair of the CAGP London Roundtable. His extensive involvement in the not-for-profit sector includes board and committee work for Brain Tumour Foundation of Canada, London Heritage Council, Western University's Faculty of Music. He was co-founder and chair of The Secrets of Radar Museum. Ryan is also active as a consultant on planned giving for a number of other charities, and a recipient of the Ontario Volunteer Service Award.*

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