Membership in CAGP offers a variety of benefits that support your development as a gift planning professional!

These outstanding products and services are part of your CAGP member benefit package:

**PRODUCTS**
- Planned Giving for Canadians
- A Charitable Guide to Planned Giving

**SERVICES**
- Ask An Advisor
- National Network of CAGP Members
- Mentorship Program

**PROFESSIONAL DEVELOPMENT/NETWORKING**
- Local Chapter Educational Events
  - Present at your Local Chapter Educational Events
- Webinar Wednesdays & other CAGP Webinars
  - Present a Webinar for CAGP
- CAGP National Conference
  - Present at CAGP National Conference
- Mentoring program involvement as a learner
  - Mentoring program involvement as a mentor
  - Publish gift planning articles or blogs

**TRAINING COURSES**
- Gift Planning Fundamentals
  - Original Canadian Gift Planning Course
  - Strategic Gift Planning Bootcamp
  - Advanced Canadian Gift Planning Summit

CAGP's training courses are designed to address the skills and attributes outlined in the Competency Framework for Charity-based Gift Planners and are for those with a basic understanding of fundraising principles and terminology (e.g., the fundraising cycle, various types of fundraising activities, donor motivations, etc.) as well as a minimum of one year active involvement in fundraising for a charitable organization.
Enabling Competencies

Relationship Building
- Develop trusted relationships that achieve a donor’s vision for philanthropy, desire for a legacy and personal needs
- Active listening
- Comfort in asking for money
- Empathy, understanding and comfort with end-of-life discussions
- Translate complex technical, legal and tax language/concepts into plain language
- Work with donors as their needs determine
- Work effectively with donors’ families and advisors
- Commitment to stewardship activities that reflect donors’ wishes
- Connect the charity’s mission to the donor’s vision
- Cultivate networks with trusted legal, tax, financial advisors
- Develop trusted relationships with charity colleagues to access resources and support

Ethics & Judgement
- Adhere to the CAGP Code of Ethics
- Balance alignment of a donor’s needs and desired legacy with competence, financial viability, family commitments, etc.
- Ability to understand and retain information, recognizing and respecting lines of confidentiality
- Recognize when to redirect a donor to a more appropriate giving vehicle and in the donor's best interests
- Identify and avoid conflicts of interest
- Understand the concept of ‘no gift before its time’

Technical Competencies

Knowledge of Gift Planning Vehicles
- Securities, registered funds, insurance, annuities, gifts in kind, for current and deferred giving
- Advantage of corporate vs personal giving
- Explain opportunities and impact of each option for the donor
- How to determine fair market value of a charitable gift and know what information to include on charitable receipts
- Know when to refer a donor to a professional advisor

Knowledge of Legal Context of Gift Planning & the Charitable Sector
- Legal implications of gift planning from the first conversation to appropriate stewardship
- Understand terminology, e.g. will clauses, gift agreements, etc.
- Management of estate gifts and estate administration
- Know when to seek legal advice and when to encourage donors to do so
- Familiarity with Canada's charitable sector and the legal framework of charities

Knowledge of Your Charity
- Familiarity with supporting data systems
- Understand and implement gift planning and gift receipting policies and procedures with diligence
- Understand management and governance
- Familiarity with vision, mission, values and strategic direction

Knowledge of Marketing & Communications
- Understanding of emerging philanthropic and sector issues and trends
- Planning and marketing techniques related to fundraising
- Understanding of the best outreach vehicles for donors
- Familiarity with donor prospecting approaches
- Ability to undertake applicable market research

Now that you've completed the checklist, use the Roadmap and decide your next steps on your journey to becoming a more successful charitable gift planner.