



# 2019

**/im,pakt/**  
report

# /im,pakt/

verb: have a strong effect  
on someone or something

1 from the top ...2

2 2019 impact ...3

3 our thanks ...4

4 gratitude from the cagp foundation ...6

5 the money ...11

6 our people ...12



# 1 from the top

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**  
Chair of the Board of Directors



**Ruth MacKenzie**  
President & CEO

## - with thanks to the CAGP Board -

Michelle Osborne, CFRE - **Chair**  
Heather Powers - **Vice Chair**  
Amanda Stacey - **Past Chair**  
Ninette Bishay, CPA, CA - **Treasurer**

Geoff Graham, CFRE - **Secretary**  
Yolanda Benoit  
Michael Blatchford  
Jill Nelson, CFRE

Beth Proven  
Conor Tapp  
Keith Thomson



# 2019 impact



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 2106, when the Foundation was established!

## CAGP FOUNDATION



6 legacy donors



100%

CAGP Board Members & Foundation Board Members are donors



\$487,960 raised in gifts and pledges



Tea consumed at the CAGP office =



## GOVERNMENT RELATIONS HIGHLIGHTS

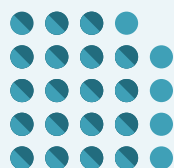


CEO quoted in Special Senate Committee Report

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



19

committee members

24

years of strategic government relations work



22

cities, towns, communities visited in 2019



## OUR BIGGEST CONFERENCE YET!

507 attendees



#CAGP19

reached 328,100 people

Introduced a new



strategic plan, setting the stage for **our future impact!**



# 3 our thanks

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  
Alyson Dahl  
Kate Donahue  
Don Gordon  
Yvette Guigeno  
Lucy Hough  
Jennifer Jasechko  
Laurie Palmer  
Kaila Pilecki

## **Greater Vancouver Area**

Aimée Lindenberger –  
Co-Chair  
Jane Westheuser – Co-Chair  
Nicco Bautista  
Karen Brown  
Aubrie Girou  
Nicole Jeschelnik  
Kris Love  
Leanne Poon  
Darya Sawycky  
Jeannie Scarfe  
Mike Todd  
Janice Williams

## **Kamloops**

Alisa Coquet – Co-Chair  
Sarah Sandholm – Co-Chair  
Danalee Baker  
Margaret Chrumka  
Nena Jovic-Andrejevic  
Shelby Lomas

## **Alberta South**

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

## **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

## **Saskatchewan North**

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

## **Saskatchewan South**

Trina Owens – Chair  
Ticia Heward  
Kurtis Krug  
Jeff Norwig  
Leanne Posehn  
Crystal Schmalle  
Kaleta Strain

## **Manitoba**

Pat Lilley – Chair  
Florence Carey  
Allison Cranmer  
Mia Dunn  
Janice Feuer  
Jackie Markstrom  
Rena Molinari  
Patrick O'Connor  
Lynda Ruban  
Stephen Webb

## **Windsor & Essex County**

Patricia Valteau – Chair  
Lisa Kolody  
Martin Sobocan  
Kim Willis

## **Sarnia-Lambton**

Jane Anema – Chair

## **Chatham-Kent**

Lisa Caron – Chair  
Brad Davis  
Jodi Maroney  
Margery Muharrem  
Anne Taylor

## **London**

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

## **Waterloo-Wellington**

Jessica Wroblewski – Chair  
Heather Curran  
Rubin Katak

## **Niagara-Golden Horseshoe**

Ricky Piedrahita – Chair  
Joanne Bedford-Harris  
Darlene Bennett-Howes  
Trevor Cooper  
Joan Cosby  
Carrie Gemmell  
Tracy Geoffroy  
Michael Longval  
Shauna Reid  
Tanya Rumble

## **Greater Toronto Area**

Serena Hak – Chair  
Marisa Barlas  
Mikhael Bornstein  
Jackie Cooper  
Janice Correa  
Sandra Dow  
Becky Fallis  
Abdesh Furmah  
Tammy Garcia  
Aneil Gokhale  
Ann Gorwill  
Karen Hudson  
Daniel Kachani  
Winsor Pepall

## **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  
Myrtle Jenkins Smith  
Rosie Shaw

## **Nova Scotia**

Lori Scott – Chair  
Sara Burke  
Doris Cameron  
Toni Croft  
Siobhan Doherty  
Liz Finney  
Jenna Joyce  
John MacDonald  
Arleen Stevens

## **Newfoundland & Labrador**

Mike Kidney – Chair





# 3 our thanks

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  
Alen Okanovic  
Charles O'Neil  
Lydia Potocnik  
Heather Powers  
Marcella Zanello

## **National Education Committee**


Michelle Osborne – Acting Chair  
Erin Kuhns  
Janice Loomer Margolis  
Ruth MacKenzie  
Paul Nazareth  
Sara Neely  
Jill Nelson  
DeWayne Osborn  
Doug Puffer  
Bob Strachan

## **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  
Laila Pirbhai  
Jo-Anne Ryan  
Amanda Stacey  
Slivia Ugolini  
Ross Young

## **Membership Committee**

Conor Tapp – Chair  
Yolanda Benoit  
Clare Levy  
Jen Pederson  
Paul Nazareth  
Jessica Thirgood



*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.*

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



# 4 gratitude

from the CAGP foundation

\ˈgra-te-,tüd-,tyüd\

noun: the quality of  
being thankful



## 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



# 4 gratitude

## from the CAGP foundation

### **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





# 4 gratitude

from the CAGP foundation



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



# 4 gratitude from the CAGP foundation

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



# 4 gratitude from the CAGP foundation

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  
Alen 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

	National Office	Chapters	CAGP Foundation	Total 2019	Total 2018
<b>REVENUE</b>					
Conference	\$ 520,181	\$ -	\$ -	\$ 520,181	\$ 411,197
Membership fees	299,890	-	-	299,890	298,297
Education courses	-	-	272,658	272,658	295,085
Leave A Legacy sponsorships	-	274,403	-	274,403	229,679
Donations	-	-	261,873	261,873	204,614
Chapter events	-	79,973	-	79,973	74,094
Job postings	33,000	-	-	33,000	32,738
Sponsorships	-	17,375	-	17,375	25,995
Interest and other	30,971	8,856	-	39,827	15,194
	<b>\$ 884,042</b>	<b>\$ 380,607</b>	<b>\$ 534,531</b>	<b>\$ 1,799,180</b>	<b>\$ 1,586,893</b>
<b>EXPENSES</b>					
Salaries and benefits	\$ 302,580	\$ -	\$ 216,812	\$ 519,392	\$ 445,401
Conference expenses	425,573	-	-	425,573	356,303
Leave a Legacy	-	256,415	-	256,415	196,180
Meals, travel and accommodation	34,657	-	95,892	130,549	155,172
Administration	60,192	43,683	20,584	124,459	129,435
Chapter events	-	100,511	-	100,511	89,267
Professional fees	50,197	-	24,571	74,768	88,057
Will Power Legacy Campaign	-	-	56,661	56,661	-
Fundraising	-	-	50,919	50,919	19,510
Rent	23,548	-	14,665	38,213	37,457
Memberships and honorariums	7,486	-	27,222	34,708	31,285
	<b>\$ 904,233</b>	<b>\$ 400,609</b>	<b>\$ 507,326</b>	<b>\$ 1,812,168</b>	<b>\$ 1,548,067</b>
<b>NET REVENUE (EXPENSES) BEFORE INTER-FUND TRANSACTIONS</b>	<b>\$ (20,191)</b>	<b>\$ (20,002)</b>	<b>\$ 27,205</b>	<b>\$ (12,988)</b>	<b>\$ 38,826</b>
Management fee	\$ 74,500	-	(74,500)	-	-
Contributions from Chapters to CAGP Foundation	-	(6,300)	6,300	-	-
Chapter grants	(30,175)	30,175	-	-	-
Conference bursaries	17,112	(17,112)	-	-	-
<b>NET REVENUE (EXPENSES) FOR THE YEAR</b>	<b>\$ 41,246</b>	<b>\$ (13,239)</b>	<b>\$ (40,995)</b>	<b>\$ (12,988)</b>	<b>\$ 38,826</b>



*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



# 6 our people

**LAURIE FOX**

Director, National Legacy Campaign

**DELANEY JACKSON**

Executive Assistant & Office Coordinator

**PEGGY KILLEEN**

Development Director, CAGP Foundation

**LARA KINNEAR**

Education & Conference Assistant

**ERIN KUHNS**

Manager, Education & Training

**CLARE LEVY**

Communications & Stakeholder Relations Specialist

**RUTH MACKENZIE**

President & CEO, CAGP / Executive Director, CAGP Foundation

**PAUL NAZARETH**

Vice-President, Education & Development

**JESSICA THIRGOOD**

Coordinator, Membership & Development

**SHARON TORLEY**

Finance Manager

*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.*

**RICKY PIEDRAHITA,**

Senior Gift Planner, The Salvation Army and Chair, Niagara Golden Horseshoe Chapter, Ontario