<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Leadership Reflection</td>
</tr>
<tr>
<td>2</td>
<td>2020 In Review</td>
</tr>
<tr>
<td>3</td>
<td>Our Thanks</td>
</tr>
<tr>
<td>6</td>
<td>Gratitude Report from the CAGP Foundation</td>
</tr>
<tr>
<td>9</td>
<td>Financials</td>
</tr>
<tr>
<td>10</td>
<td>About Us</td>
</tr>
</tbody>
</table>
Despite the challenges 2020 brought, in reflecting on the year to compose this message, it was easy to see successes and causes for celebration, too. Charities and nonprofits need to be able to clearly show the impact they are having and that is a strong underpinning in this report as we share the story of the difference we are making for professionals and donors when, together, they realize philanthropic aims and transform our communities. Gratitude is also at the core of the annual report, and nowhere is that more true than in the message from the CAGP Foundation, as our vital partner in all things strategic charitable gift planning.

This impact is perhaps most exemplified by the 2020 launch of the Will Power campaign. Benchmarking research on the state of legacy giving in Canada provided the basis for campaign goals, and an enormously successful pilot campaign launch in Ontario’s Niagara-Golden Horseshoe has us well on our way. The pilot also resulted in unanticipated momentum leading to an accelerated roll-out of a Pan-Canadian and fully bilingual campaign in 2021.

The Education program was truly turned on its head in 2020. “Pivot” has become a rather tiresome term, but its over-use is perhaps because it’s so tremendously apropos. We did just that in meeting our goals this year and we saw some enormous successes doing so in an online setting – in fact, hastening a tactic identified in our 2019-2023 strategic plan – with Summer School, the virtual Gift Planning Fundamentals, and the Advanced Philanthropy Series.

The cancellation of the Annual Conference on Strategic Philanthropy may have been an historical ‘downer’ for us, but also perhaps our most compelling narrative of impact and greatest message of gratitude. Delegates, sponsors, Chapters, and donors stepped up in droves offering their support to help us weather that financial storm, which for CAGP could have had implications of an El Nino scale. We expressed our immense appreciation with our #CAGP21Heroes social media campaign.

When this all began, few would have imagined that a year later we would still be living the COVID-19 pandemic, and it continues to be an extraordinarily uncertain and difficult time for many charities, communities, and individuals. We remain mindful of that, but also recognize the innovation, adaptation, resilience, kindness, and reciprocity that has also emerged as a result. Perhaps something to be most grateful for...

Thank you and stay well,
Michelle & Ruth

With thanks to the CAGP Board

Michelle Osborne, CFRE – Chair
Heather Powers – Vice Chair
Ninette Bishay, CPA, CA – Treasurer
Geoff Graham, CFRE – Secretary
Yolanda Benoît
Michael Blatchford
Janice Feuer
Jill Nelson, CFRE
Beth Proven
Conor Tapp
Keith Thomson
2020 in review

Explore some of the many highlights of 2020:

education

2020 saw the shutdown of all our in-person education offerings in late February and the cancellation of the national conference in March. Despite the challenges of the early months of COVID-19, we pulled together and delivered two brand-new online offerings, Summer School and the Advanced Philanthropy Series, plus we adapted our popular one-day Gift Planning Fundamentals to a virtual program delivered in two half-day sessions. Webinar Wednesdays continued through 2020, with over 2,200 people attending the various sessions offered, up from 1,500 in 2019.

I greatly appreciate that CAGP has been a leading organization in maintaining professional development for the philanthropy professional through a very trying and difficult time. CAGP has and continues to provide an excellent return on investment of dollars and time. The value of Planned Giving to our institution is greatly advanced by CAGP’s commitment to its members.

— Susan Reid, Director, Bequests and Planned Gifts, McGill University

memberShip

Membership stayed strong in 2020 despite the global pandemic, with 1145 active members as of Dec 31, 2020. That’s an increase of 5% from the previous year. In times of challenge, CAGP is here for our community.

WILL POWER

During a global pandemic, we forged ahead with the pilot of the new public-facing legacy giving campaign, which would come to be known as Will Power, in the Niagara-Golden Horseshoe region of Ontario. The pilot ran in September, and in just one month, amazing results were achieved, prompting us to move forward with planning the pan-Canadian launch in 2021.

47,180 visits to willpower.ca
1744 actions taken on the website
15 local news stories
our thanks

CAGP’s success relies heavily on the 20 Chapters across Canada that are led by 155 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
Rod Abbott
Laurie Bienert
Beth Cairns
Alyson Dahl
Kate Donahue
Jane Evans
Yvette Guigueno
Jennifer Jasechko
Greg Kuhn

**Greater Vancouver Area**
Aimée Lindenberger - Chair
Nicco Bautista
Karen Brown
Aubrie Girou
Moira Gookstetter
Robert Hamanishi
Raman Johal
Kris Love
Leanne Poon
Jeannie Scarfe
Darya Sawycky
Mike Todd
Janice Williams
Jane Westheuser

**Kamloops**
Alisa Coquet - Co-chair
Sarah Sandholm - Co-chair
Margaret Chrumka
Nena Jocic-Andrejevic
Shelby Lomas

**Alberta South**
Sheelagh Mercier - Chair
Heather Berezowski
Kevin Davidson
Susan Deike
Karen Filbert
Kathryne Gibson
Kaleigh Goehringer
Rob Locke
Neil Williams
Ross Young
Shirley Yurchi

**Alberta North**
Leona Yez - Chair
Laura Gadowsky
Darlene Kowalchuk
Randy Liedtke
Matt Mandrusiak
Barb Noble
Sherry Schaefer
Christy Soholt
Laura Svajlenko

**Saskatchewan North**
Melissa Mann - Chair
Trina Mortson
Jen Pederson
Stacey Schewaga
Jay Stark

**Saskatchewan South**
Kurtis Krug - Chair
Maureen Harrison
Ticia Heward
Michele Krieger

**Manitoba**
Jackie Markstrom - Chair
Kathryne Cardwell
Florence Carey
Mia Dunn
Janice Feuer
Pat Lilley
Rena Molinari
Patrick O’Connor
Beth Proven
Lynda Ruban
Stephen Webb

**Windsor & Essex County**
Patricia Valleau - Chair
Kelly Gosselin
Lisa Kolody
Sandra Presland
Kim Willis
Peggy Winch

**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

Jeff Norwig
Trina Owens
Leanne Owens
Crystal Schmalle
Kaleta Strain
Trish Gergich
Sue Hardy
Vicki Hayter
Sarah Morkin

**Waterloo–Wellington**
Jessica Wroblewski – Chair
Landon Jennings
Rubin Kataki

**Niagara–Golden Horseshoe**
Carrie Gemmell – Chair
Darlene Bennett-Howes
Amanda Braet
Joan Cosby
Erin Court
Tracy Geoffroy
Joanne Harris-Bedford
Michael Longval
Ricky Piedrahita
Carol Rame
Shauna Reid
Tanya Rumble

**Greater Toronto Area**
Janice Correa – Co-chair
Karen Hudson – Co-chair
Marisa Barlas
Jack Bergmans
Mihkael Bornstein
Eli Clarke
Becky Fallis
Abdesh Furmah
Tammy Garcia
Angus Gordon
Ann Gorwill
Serena Hak
Daniel Kachani
Richard Lefebvre

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

**Greater Montreal Area**
Michel Beauchamp – Co-chair
Antonietta Nicolo – Co-chair
Gérard Briand
Kim Cavener
Josée Darche
Gina Di Filippo
Lucille Grimard
Jeremy Hampson
Natalia Kistruga
Nancy Lepage
Kim Nguyen

**Prince Edward Island**
Kent Hudson – Chair

**Nova Scotia**
Liz Finney – Chair
Sara Burke
Doris Cameron
Toni Croft
Siobhan Doherty
Alyssa Feir
Geoff Graham
John MacDonald
Lori Scott
Arlene Stevens

**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 Program Committee**
Denise Fernandes – Chair
Ryan Fraser
Aneil Gokhale
Lisa Green
Erin Kuhns
Ruth MacKenzie
Melissa Mann
Alen Okanovic
Charles O’Neil
Lydia Potocnik
Heather Powers
Marcella Zanella

**National Education Committee**
Jill Nelson – Chair
Claude Drouin
Ryan Fraser

**Government Relations Committee**
Amanda Stacey – Chair
Michael Blatchford
Rick Braun-Janzen
Malcolm Burrows
Terrance Carter
Nicole D’Aoust
Mark Goldbloom
Elena Hoffstein
Robert Kleinman
Brenda Lee-Kennedy
Ruth MacKenzie

**Membership Committee**
Conor Tapp – Chair
Yolanda Benoit
Khalil Guliwala
Lara Kinnear
Clare Levy
Jen Pederson
Paul Nazareth
Tanya Rumble

Susan Manwaring
Janice Loomer Margolis
Margaret Mason
Brenda McEachern
Grant Monck
Elizabeth Moxham
Jill Nelson
Bradley Offman
Michelle Osborne
Lailly Pirbhai
Jo-Anne Ryan
Sivia Ugolini
Ross Young

We would also like to recognize and thank these funders and sponsors for their support in 2020.

Abundance Canada
Blackbaud Canada
Blakely
BMO
CI Assante
DLA Piper
The Donor Motivation Program™
DonorPerfect
Environics Analytics
Link Charity
Miller Thomson
PearTree Canada
Private Giving Foundation at TD
Raymond James
South Saskatchewan Community Foundation
WCPD Foundation

In 2020, Terrance Carter, Elena Hoffstein and Peggy Killeen have been recognized for their contribution and dedication to the mission of CAGP.
What a year 2020 was! Like everybody in our sector, we’ve had to find new ways to accomplish our goals and serve our mission.

Extraordinary people in extraordinary times

We are so grateful to our remarkable donors and supporters, our volunteers and leaders, who have been with us all the way as we rose to the challenge. Their commitment and support has been crucial at this time and have allowed us to maintain stability at this difficult time. They believe in us. They share our vision of long-term impact on philanthropy in Canada.

By the numbers

Thanks to dedicated work by our volunteers around the country we were able to raise $353,327 in gifts and pledges. Our actual revenue for the year was $322,776. Our donor retention rate remains 20% higher than the sector average and we are sustained by the multi-year pledges that the majority of our donors have made. We enjoy 100% support from both the CAGP and the Foundation Boards. Our endowment at The Winnipeg Foundation now stands at $32,992.

The message is loud and clear

We believe that the events of 2020 have delivered an important message. Our objectives – education, research, advocacy and raising public awareness around strategic charitable giving – are crucial to building resilience in our sector. At a time like this we provide a clear focus on the importance of planned giving programs to sustain our organisations and our communities. It’s our moment to educate, to collaborate and to lead.

There’s still much to do to build on the spirit of generosity in this country, and going forward we’ll continue to need your support and engagement more than ever. Thank you for your confidence in us.

We could not have done it without you.
Our 2020 donors and supporters

We’re immensely grateful to our family of donors for their loyalty and generosity. In this listing we are also recognizing the heroes who rose to meet the challenge of our conference cancellation through financial support of CAGP.

$500,000+
Donald K. Johnson

$50,000+
Benefaction Foundation
Rideau Hall Foundation
The Donor Motivation Program™

$25,000+
CAGP Alberta South Chapter

$10,000+
Lawson Foundation
Susan Manwaring

$5,000+
CAGP Greater Toronto Area Chapter
Carters Law Firm
Sandra Dow
Jeremy Hampson
Elena Hoffstein
Peggy Kileen
Ruth MacKenzie
Margaret Mason
Darren & Monika Pries-Klassen
Scotia Wealth Management
Robert Strachan
Ross B. & Alison Young

$2,500+
Rod Abbott
Yolanda Benoit
Cardinal Capital Management
Kim Cavener
Joan Cosby
Leah Eustace
Calvin Fong
Geoff C. Graham & James B. Tee
Tony Lee
Greg Lichti & Garth Norbraten
Sara Neely
Jill Nelson
Blackwood Family Enterprise Services
Michelle M.B. Osborne
Beth Proven
Gregory Snider
Amanda Stacey
Jasmine Sweatman
Andrew Valentine

$1,000+
Joan Blight
CAGP Alberta North Chapter
CAGP Greater Vancouver Chapter
Calgary Foundation
Lars A. Callieou
Florence Carey
Ian Fraser
Doug & Carla Funk
Serena Hak
KBF Canada
Clare Levy
Paul & Chastity Nazareth
Charles O’Neil
PGgrowth
Ricky Piedrahita
Heather Powers
Doug Puffer
Ralph & Gay Young Family Capital Fund
Raymond James Canada Foundation
Lorna Somers
Jay Stark
Conor Tapp
Anne Thibodeau
Silvia Ugolini
Janice Williams
Marcella Zanella
$500 +
Michael Blatchford
Rick & Colleen Braun - Janzen
Malcolm Burrows
CAGP Saskatchewan
North Chapter
Doris Cameron
Betty-Anne Howard
Randy Liedtke
Janice Loomer Margolis
Frank Minton
Grant Monck
Marilyn Monson
Brad Offman
Jen Pederson
Jo-Anne Ryan
Mark Stefan
Tina Tehranchian
Brad Willems

CAGP Saskatchewan
North Chapter

$250 +
Abundance Canada
AFP Central Ontario Chapter
Malcolm Berry
Ninette Bishay
Eli Clarke
Paola Coronado Hass
Janice Feuer
Leila Fiouzi
Ryan Fraser
Kathryne R. Gibson
Phil Levson & Sherry Dahl
David Love

Maritime Conference
of the Seventh-Day Adventist Church
Jackie & Kurt Markstrom
Chelsea McIntyre
Jenny Mitchell
Ligia Peña
Andrea Robertson
Becki Willoughby

$100 +
Christine Beaumont
Yolanda Bronstein
CAGP South Saskatchewan
Chapter
Barbara Chambers
Jacqueline Cooper
Colleen DeJager
Claude Drouin
ELFEC
Liza Fernandes
Diane Laundy
Frank Lockington
Meredith Meads
Sheelagh Mercier
Elizabeth Moxham
Maurice Prevost
Thomas G. Riglar
Sue Rosenblat
Lori Scott
University of Toronto
Jennifer Walsom
Leona Yez
YPI Canada
June Ziola

Up to $100
Kathy Arney
Marisa Barlas
Brittany Beatty
Katharine Berrington
Candace Boerrington
CAGP Manitoba Chapter
CAGP Ottawa Chapter
Kathryne Cardwell &
Charles McDougall
Mark Climie-Elliott
Simona Dobransky
Epilogue Wills
Tara George
Delaney Jackson
Lara Kinnear
Erin Kuhns
Alen Okanovic
Jessica Thigood
Sharon Torley
Natasha van Bentum

Legacy Donors
Michelle Johnson
Ruth Mackenzie
Chelsea McIntyre
Paul C.S.C. Nazareth
Beth Proven
Keith Thomson
## Financials

For the Year Ended December 31, 2020

<table>
<thead>
<tr>
<th></th>
<th>National Office</th>
<th>Chapters</th>
<th>CAGP Foundation</th>
<th>TOTAL 2020</th>
<th>TOTAL 2019</th>
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<td><strong>Revenue</strong></td>
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<td></td>
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<tr>
<td>Will Power campaign contributions</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 350,675</td>
<td>$ 350,675</td>
<td>$ 56,661</td>
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<tr>
<td>Membership fees</td>
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<td>286,846</td>
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<td>Education courses &amp; designation program</td>
<td>20,167</td>
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<td>214,016</td>
<td>234,183</td>
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<td>Donations</td>
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<td>205,212</td>
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<td>Leave a Legacy sponsorships</td>
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<td>190,887</td>
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<td>274,403</td>
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<td>Conference</td>
<td>143,417</td>
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<td>143,417</td>
<td>520,181</td>
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<td>Government assistance</td>
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<td>-</td>
<td>100,235</td>
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<tr>
<td>Chapter Events</td>
<td>-</td>
<td>31,641</td>
<td>-</td>
<td>31,641</td>
<td>79,973</td>
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<tr>
<td>Job postings</td>
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<td>22,100</td>
<td>33,000</td>
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<td>Sponsorships</td>
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<td>5,250</td>
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<td>5,250</td>
<td>17,375</td>
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<tr>
<td>Interst &amp; other</td>
<td>20,724</td>
<td>909</td>
<td>-</td>
<td>21,633</td>
<td>39,827</td>
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<tr>
<td><strong>Total</strong></td>
<td>593,489</td>
<td>228,687</td>
<td>792,820</td>
<td>1,614,996</td>
<td>1,799,180</td>
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<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel</td>
<td>318,319</td>
<td>-</td>
<td>237,913</td>
<td>556,232</td>
<td>519,392</td>
</tr>
<tr>
<td>Will Power campaign</td>
<td>-</td>
<td>-</td>
<td>343,197</td>
<td>343,197</td>
<td>56,661</td>
</tr>
<tr>
<td>Leave a Legacy</td>
<td>-</td>
<td>172,641</td>
<td>-</td>
<td>172,641</td>
<td>256,415</td>
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<tr>
<td>Conference</td>
<td>147,071</td>
<td>-</td>
<td>-</td>
<td>147,071</td>
<td>425,573</td>
</tr>
<tr>
<td>Administration</td>
<td>55,409</td>
<td>31,048</td>
<td>20,009</td>
<td>106,466</td>
<td>124,459</td>
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<tr>
<td>Fundraising</td>
<td>-</td>
<td>-</td>
<td>46,039</td>
<td>46,039</td>
<td>50,919</td>
</tr>
<tr>
<td>Professional fees</td>
<td>32,473</td>
<td>-</td>
<td>11,835</td>
<td>44,308</td>
<td>74,768</td>
</tr>
<tr>
<td>Chapter events</td>
<td>-</td>
<td>43,519</td>
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<td>43,519</td>
<td>100,511</td>
</tr>
<tr>
<td>Meals, travel &amp; accommodation</td>
<td>1,218</td>
<td>-</td>
<td>37,612</td>
<td>38,830</td>
<td>130,549</td>
</tr>
<tr>
<td>Rent</td>
<td>22,112</td>
<td>-</td>
<td>15,165</td>
<td>37,277</td>
<td>38,213</td>
</tr>
<tr>
<td>Memberships &amp; honorariums</td>
<td>6,310</td>
<td>-</td>
<td>13,842</td>
<td>20,152</td>
<td>34,708</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>582,912</td>
<td>247,308</td>
<td>725,612</td>
<td>1,555,832</td>
<td>1,812,168</td>
</tr>
<tr>
<td><strong>Net Revenue (Expenses) Before Inter-Fund Revenue and Expenses</strong></td>
<td>10,577</td>
<td>(18,621)</td>
<td>67,208</td>
<td>59,164</td>
<td>(12,988)</td>
</tr>
<tr>
<td>Contribution from Chapter to National Office</td>
<td>30,000</td>
<td>(30,000)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Chapter grants</td>
<td>(30,330)</td>
<td>30,330</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Management fee</td>
<td>91,478</td>
<td>-</td>
<td>(91,478)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sponsorship</td>
<td>15,000</td>
<td>-</td>
<td>(15,000)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Net Revenue (Expenses) For the Year</strong></td>
<td>$ 116,725</td>
<td>$(18,291)</td>
<td>$(39,270)</td>
<td>$ 59,164</td>
<td>$(12,988)</td>
</tr>
</tbody>
</table>
about us

Join us in making the world a better place through strategic charitable giving!

Our Team

LAURIE FOX
Director, National Legacy Campaign

DELANEY JACKSON
Executive Assistant & Office Coordinator

PEGGY KILLEEN
Development Director, CAGP Foundation

LARA KINNEAR
Membership Coordinator

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

SHARON TORLEY
Finance Manager