



Greater Vancouver Chapter

Mentor Application Form

Thank you for your interest in the CAGP Vancouver Chapter Mentorship Program! Please complete this questionnaire to help us better pair you with one of our Learning Partners.

Once completed, please click the "Submit Form" at the end of the application.

Contact Details

Full Name: _____ Phone: _____

Employer: _____ Email: _____

**please check off preferred contact method*

Work Address: _____

City: _____ Postal Code: _____

Application

Are you a member in good standing with CAGP?

Yes No

If you are not a member you may still join the program

Please indicate the number of years you have been a member of CAGP:

3 years or less 3 -5 years 5 - 10 years More than ten years

Please indicate the number of years you have been employed in the Charity/Planned Giving sector:

3 years or less 3 -5 years 5 - 10 years More than ten years

Please indicate how long you have been employed with your present employer:

3 years or less 3 -5 years 5 - 10 years More than ten years

Please indicate any professional designation(s) and if you hold a CFRE designation:



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For non-professional advisors, please indicate what Planned Giving Courses you have taken:

- The Original Gift Planning Course
- BCIT Fundraising Course
- Advanced Canadian Gift Planning Symposium
- Other: _____

6. Referring to the CAGP Competency Framework, please indicate in which areas are you best suited to mentor:

- Relationship Building
- Ethics & Judgement
- Knowledge of Gift Planning Vehicles
- Knowledge of a charity's framework (policies and procedures, management & governance etc.)
- Knowledge of Legal Context of Gift Planning & the Charitable Sector
- Knowledge of Marketing & Communications

Please tell us about the reason(s) for wanting to serve as a Mentor and whether you would like to be matched with a professional advisor or gift planner:

Do you feel best suitable to mentor a Learning Partner from an organization with fundraising staff of:

- 3 or less
- 4 - 9
- 10 +
- Not sure



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In which industries have you worked as a Planned Giving professional?

Charity:

- Animal Protection & Welfare
- Community services
- Culture & Recreation
- Education & Job Training
- Environment & Conservation
- Family & Senior Support
- Health & Wellness
- Health Research
- International Development
- Law & Legal Support
- Poverty Alleviation
- Youth Services

Professional Advisor:

- Legal Advisor
- Accountant or Financial Planner
- Other: _____
- Insurance / Investment Advisor
- Trust Officer

8. Any Other Comments?

SUBMIT

*****Submit button will not work in browser, please download form***

Thank you!

We look forward to matching you with a Learning Partner and seeing you at future CAGP events. Don't forget to subscribe to our newsletter [here](#).