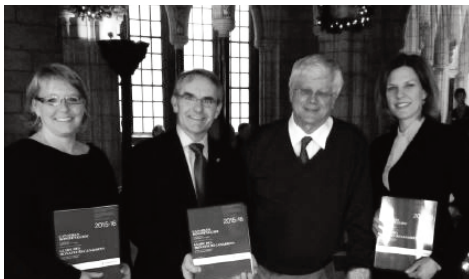




ALL EYES ON THE MISSION

2015
ANNUAL REPORT

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Leadership Message

Dear Friends,

2015 was another busy and exciting year for CAGP, and we are enormously proud of what we have achieved.

Our strategic plan, CAGP 2013: The Next 3 Years, continued to guide us in our day-to-day work, in how we deployed our resources and in decision-making over the many opportunities at our disposal. We believe that CAGP's position as the recognized authority on gift planning has been raised, that our education program continues to elevate professionalism and competency, that our business model is evolving and is increasingly providing the foundation to enable our future, and that we have the elements of leadership in place to support our continued transition and growth.

Enhancing and improving communication and information sharing from board to membership, from national office to local Chapters, from our organization to our broader stakeholder audience, is a persistent endeavour. Through quarterly member communiqués, our regular CAGP eNews, and sharing timely and relevant information through other communication channels, we strive to ensure

our members and partners are apprised of what we're focusing on, changing contexts and emerging issues.

As such, rather than a more fulsome year-in-review, we're opting instead to use this Annual Report to highlight key activities, accomplishments, achievements – from our Government Relations Committee's leadership on new estate legislation to a refreshed corporate image to exciting partnerships – so that we might, together, celebrate CAGP's strengthened voice, profile, leadership and foundation. These achievements are not just ours to revel in. They are yours.

We're proud of our progress and successes, but also move forward into this year and the next, balancing excitement with pragmatism. We're hopeful that fiscal deficits are behind us, yet we remain cognizant of our ongoing resource limitations. While our Chapters are our foremost partners, we recognize the imperative to provide much-needed support. While we are confident in the outstanding quality of the education we offer, the competitive context remains very real. While we enjoy increased

visibility, there is still enormous ground to cover. These opportunities have us motivated and enthusiastic about our future and guarantee that we will never experience the tyranny of the mundane!

In closing, we acknowledge and extend enormous gratitude to our collective of board, volunteers, staff, members, partners, stakeholders, supporters. It is only through your commitment, confidence and generosity that we are able to accomplish what we do and realize our success. Thank you.

Yours very truly,



Darren Pries-Klassen
Chair of the Board of Directors



Ruth MacKenzie
President & CEO

"CAGP has been my key professional association since 1995. Over twenty years, my career moved from law to gift planning to more general fundraising and then consulting. CAGP has been a key part of my career development all along the way. Many of my long-term professional colleagues and friendships began through my involvement with CAGP. Thank you CAGP!"
Grant Monck, LL.B., Strategic Fundraising Consultant, Grant Monck Fundraising Consultant Services

About Us

The **Canadian Association of Gift Planners** is a national association that inspires and educates the people involved in strategic charitable gift planning. We are the only Canadian professional association that brings together charitable fundraisers and professional advisors. Through our commitment to a stringent Code of Ethics, continual learning and networking, and a willingness to share, we help each other grow and develop as professionals in our respective fields.

"I am inspired by CAGP, an organization that is truly helping donors accomplish their philanthropic goals. CAGP and its members have been essential to my professional growth and I feel lucky to have access to such a dynamic networking environment. I am proud to know that together we are creating stronger communities."

Paola Coronado-Hass, Planned Giving, Development Officer, BC Cancer Foundation, Co-Chair, CAGP Greater Vancouver Chapter

Our Vision

A better world through strategic charitable giving.

Our Mission

To champion the growth and development of strategic charitable gift planning in Canada by:

- **Developing knowledge and providing education**
- **Building awareness and promoting philanthropy**
- **Creating connections and facilitating partnerships**
- **Engaging in national dialogues and influencing public policy.**

Highlights

We are pleased to highlight some of our most notable achievements and events, changes and turning points of 2015.

We invite you to explore our website <https://www.cagp-acdp.org> for more information on each activity.

Our esteemed Government Relations Committee tackled new estate administration rules, slated to come into effect in January 2016. In identifying potential challenges for charities when realizing gifts from complex estates, the Committee began strategizing to ensure CAGP's voice and the views of the sector were heard with policy makers and that gift planners and allied professionals were aware of and ready to deal with these changes.

To raise awareness on the new estate administration rules and ensure our members could prepare for these changes, we partnered with **Gift Planning in Canada** for a February special edition dedicated to the issue, providing array of articles from expert practitioners and professionals on a variety of topics.

One of our most significant changes this year was the launch of a new membership model, which included an amended pricing structure to meet the diverse needs of our members and to set the stage for growth. A partnership with United Way-Centraide Canada continues, and new partnerships were established with Community Foundations in BC and Humber College in Toronto.

To continue to educate the sector and allied professions on the new estate administration rules, we delivered a special webinar, **Canada's New Estate Administration Rules. Understand; Get Ready.** With sponsorship provided by Miller Thomson, we were able to offer this webinar at no cost, not just to our members but to the sector at large, inviting Imagine Canada, the Association of Fundraising Professionals, Philanthropic Foundations of Canada and others to promote this to their members and stakeholders.

Speaking to Finance on the new estate administration rules, our Government Relations Committee provided a written submission outlining concerns as to how the changes may adversely impact charities as well as suggestions for amendments to address those challenges. The submission opened a dialogue between the Department of Finance and CAGP that continued throughout the year.

The Original Canadian Gift Planning Course – aka **The Banff Course** – returned to Banff! Whatever you call it, 2015 saw another successful, sold-out event with attendees having, what we continue to be told is, a career-changing experience.

"If we didn't have CAGP, there simply wouldn't be the learning that there is. They are the lifeblood of the small organization. They are the go-to."

**Colleen DeJager, TEP, Director,
Planned and Memorial Giving,
London Health Sciences
Foundation**

"The CAGP Original Gift Planning Course is one of the best strategic and practical courses that I have attended."

Karen Caughey, Executive Director, The ALS Society of Alberta

When the federal government released the 2015 Budget on the opening day of our Conference, we were thrilled to see it included new incentives for charitable giving, providing a capital gains exemption on gifts made from the sale of real estate and private company shares. This incentive was first proposed by CAGP in 2008 and has been tirelessly championed by Friend of CAGP, Donald K. Johnson. Follow-up media pick-up included CAGP's perspective quoted in the Globe & Mail.

On May 14th, as part of a consortium of national organizations, CAGP participated in the first "Day on the Hill", meeting with Senators and Members of Parliament from all parties. Representing CAGP were Darren Pries-Klassen, Chair of the Board of Directors, Malcolm Berry, Past Board Chair, Susan Manwaring, [then] Chair of the Government Relations Committee and Ruth MacKenzie, President & CEO. In total, 27 meetings were held and key messages focused on recognizing the imperative role of the sector and our vital contribution to the strength of this country. While meeting with Finance Minister Joe Oliver, Malcolm was able to emphasize CAGP's role in recent budget provisions which support planned giving.

Following up on the successful Day on the Hill in May, CAGP as part of a collective of 9 organizations, released the **Federal Platform Proposal** for all political parties to consider integrating in their platforms for the October federal election. Outlining concrete action items, it called for all parties to ensure government creates an enabling environment for charities and nonprofits to respond to growing and changing community demands, and implement policies that contribute to long term financial health of charities and nonprofits, so that they can better serve communities.

In an effort to draw financial advisors to professional development on philanthropy and strategic gift planning, our one-day Gift Planning Fundamentals course was successfully accredited by The Institute for Advanced Financial Education. For the next two years, advisors taking this course will receive 8.0 continuing education credits which can be applied towards their yearly professional development requirements.

CAGP rebranded! We completely scrapped off our old look and launched a new logo with a fresh new feel and colour. The new logo with three interwoven strands represents our members, networks and donors as well as the circles of giving, collaboration and knowledge. At the same time, we also moved away from the bilingual CAGP-ACPD acronym to unilingual logos in each official language, changed the nomenclature of our local counterpart from RoundTable to Chapter, and produced our first Annual Report.

At the end of our 2014-15 fiscal year we were "back in black"! We were celebrating big over a small surplus, after several years of deficits. At the same time, we are ever-aware of the need for ongoing fiscal prudence and continued evolution of our business model to ensure our sustainability into the future.

"GIV3 is thrilled to be partnering with CAGP - working together has been a positive and rewarding experience. Their knowledge, professionalism and unparalleled commitment to growth in strategic charitable giving make them an ideal partner for us. We look forward to continuing our long-term collaboration on capacity building projects to benefit the entire charitable sector."

Lys Hugessen, President, GIV3

April

May

July

August

We officially launched our new website and CRM that reflect our modernized corporate image. This launch would not have happened without our National Website Partners' interest and support and we are so appreciative of their partnership and commitment to CAGP. At the same time, the launch wasn't without its challenges. We thank our members for their continued patience as we worked over the following months to iron out malfunctions, continued to review and refine content and test core functions to achieve a positive user experience for our stakeholders.

Continuing our collaboration with GIV3 and Philanthropic Foundations of Canada, we followed up on our research project, The Philanthropic Conversation, undertaken with BMO Private Banking, and partnered with WealthProfessional.ca on **10 Weeks/10 Ways: Engaging Clients in the Philanthropic Conversation**. Over ten weeks from September to November we delivered a series of articles targeted to financial advisors and providing expert advice on the how-to's of supporting their clients on a philanthropic journey.

After careful consideration, CAGP's Board of Directors made the decision to not seek a continued partnership with Great-West Life as a Local Granting Sponsor for the Leave A Legacy program. The decision was made in consideration of CAGP's resource capacity and also recognizing the resource gap for national leadership and infrastructure to support the program. The decision was communicated to Great-West Life with an expression of deep appreciation for the many years of support, and subsequently delivered to our Chapter and Leave A Legacy Chairs by teleconference and to the broader membership in a Board communiqué. We remain committed to the Leave A Legacy message and will continue to retain the national brand and license. Given its grass-roots nature, know that it will continue to thrive through local Chapters, while we continue to explore opportunities for a new partnership.

The widely-read industry publication, Investment Executive, expressed an interest in The Philanthropic Conversation, interviewing CAGP's President & CEO, Ruth MacKenzie. The article, **Charity Begins with Caring Advisors**, appeared in their November issue and advised professional advisors to talk to their clients about charitable-giving options, also offering suggestions how to do so in a way that would deepen the client-advisor relationship.

Gift Planning Fundamentals was delivered in French for the first time! As a National organization, we strive to deliver messages and events in both of Canada's official languages. This was an important milestone in our professional development portfolio and the solid turnout was inspiring. We hope to bring more events in French in the future.

Another **Strategic Gift Planning Bootcamp for Major Gift Professionals** was successfully delivered in Ontario, with great feedback received from attendees, praising faculty and the significant learning opportunity they have provided.

As draft legislation on the new gifting provisions related to capital gains exemption on gifts of real estate and private company shares was released, interested parties were invited to provide input. CAGP's Government Relations Committee continued to ensure the perspective of charities was communicated by making a submission and identifying areas where amendments may be required to provide optimal benefit for charitable gifting.

October

September

Over the fall months we solicited input from members and stakeholders through a survey and key informant interviews as part of CAGP's strategic planning process. This valuable feedback was fully considered as the Board of Directors and staff team engaged in a full day of deliberative dialogue, considering progress, successes and gaps in the current strategic plan and opportunities, necessities and strategies for the future. Our CEO and Board then worked hard to craft a plan for 2016-18 and to share that plan with our valued members.

Introduced with a covering letter from CAGP's Board Chair, Darren Pries-Klassen, and President & CEO, Ruth MacKenzie, the Canadian Donor's Guide was delivered to Canada's 338 newly-elected Members of Parliament. We express our enormous appreciation to publisher Anderson Charters for sharing this important reference book on the charitable sector and to raise CAGP's visibility with Canada's elected officials.

November concluded on a year-long roadshow of *The Philanthropic Conversation* and the tremendous interest in this study that demonstrates a clear business case for professional advisors to discuss philanthropy with their clients. In addition to the official launch at CAGP's national conference in Halifax and a subsequent national webinar, presentations were carried out to the Society of Trust and Estate Practitioners (STEP) in Montreal, Carleton University's Masters of Philanthropy and Nonprofit Leadership Program, the Nova Scotia Chapter of Advocis, the Doing Well by Doing Good Philanthropy Conference in Hamilton, and the Vancouver CAGP-Estate Planning Council. We continue to field requests into 2016 and have reports of many Chapters facilitating local presentations. The study has also opened countless doors to explore further strategic alliances.

In December we reflected on this busy and exciting 2015 and we are proud to have ended this year stronger than ever. More profile with media, new collaborations and strategic alliances, increased dialogue with government and the enactment of long-championed charitable gifting provisions all point to heightened profile and credibility of our association. We end 2015 with 1,098 members, having reached 1,468 colleagues, nationally, through our professional development offerings and with significantly more engaged social media channels. All this has us energized and enthused for what we know will be an equally exhilarating 2016.

November

"As a strong believer in the dreams and power of donors to make the world a better place, I truly value my membership in CAGP – an organization that offers outstanding educational programming at the National and Chapter level, and brings together both Professional Advisors and Fundraisers in support of strategic charitable giving."

Gwen Chapman, Principal,
DonorFocus 360

December

Sponsors Funders Partners

We are grateful for our many sponsors, funders, and partners, and we thank them for their generous support that makes our work possible.

BMO Private Banking

Bull Houser

Capacity Marketing for Charities

Carters Professional Corporation

Canadian Institute of Certified Executor Advisors

DLA Piper

The Donor Motivation Program

DonorPerfect Canada

Environics Analytics

Fasken Martineau DuMoulin LLP

GIV3

Great-West Life, London Life, Canada Life

Harvey McKinnon Associates

Johnson Insurance

Lawton Partners

Legacy Leaders

Miller Thomson LLP

Mindpath

PearTree Financial Services

PG Calc

PGgrowth

Philanthropic Foundations of Canada

ProDon-Logilys

RBC Wealth Management / Philips Hager North

Investment Council

Russell House Marketing

S.T. Legacy Group

Scotia Wealth Management

SickKids Foundation

TD Waterhouse

United Way Centraide Canada

Vancouver Foundation

Wealth Professional

"One of the great things about CAGP is your instant connection to the philanthropic community across Canada - no other organization I belong to has the same culture of sharing. As a consultant in the industry, I am constantly surprised at how tightly knit the CAGP community is. Being a highly active member of CAGP, a frequent conference speaker and a past Chapter chair brings instant, recognizable credibility within the field. No other organization has been as important to our business."

**Ryan Fraser, CFP CIM, Owner,
Quiet Legacy Planning
Group Ltd**

National Website Partners:

SickKids Foundation

Canadian Cancer Society – Ontario Division

The Donor Motivation Program

Mennonite Foundation of Canada

Princess Margaret Cancer Foundation

Queen Elizabeth II Health Sciences Centre

Foundation

CAGP Greater Toronto Area Chapter

CAGP Alberta South Chapter

CAGP Greater Vancouver Chapter

CAGP Montreal Chapter

CAGP Manitoba Chapter

Our People

We celebrate our people as the driving force of CAGP. We are fortunate to work with visionary leadership from the Board of Directors, exceptionally committed volunteers on our national committees and working groups, Chapter Executives that keep CAGP alive in communities across this country, and a passionate national staff team dedicated to representing CAGP and serving our members.

Board of Directors



Friends of CAGP

Every year the CAGP Board presents the Friend of CAGP Award to individuals who embody the vision and spirit of CAGP, have made a contribution to the field which has made an impact on a national scale and demonstrate a high regard for the professions involved in strategic charitable gift planning. In 2015 the recipients of this prestigious Award were:

Roger Lee, LL.B



Michelle Osborne, CFRE

National Volunteers

Heather Berezowski
 Malcolm Berry
 Carey Bornn
 Malcolm Burrows
 Norma Cameron
 Helen Chapman
 Gwen Chapman
 Marie-Anne Desjardins
 Carla Funk
 Mark Goldbloom
 Elena Hoffstein
 Jennifer Jasechko
 Peggy Killeen
 Robert Kleinman
 Jodi Larmour
 Brenda Lee-Kennedy
 Alain Lévesque
 Rob Locke
 Tania Loftsgard
 Janice Loomer Margolis
 Susan Manwaring
 Margaret Mason
 Sue McIntosh
 Sheelagh Mercier
 Grant Monck
 Elizabeth Moxham
 Paul Nazareth
 Jill Nelson
 Cindy Neufeld
 Brad Offman
 Alen Okanovic

Charles O'Neil
 DeWayne Osborn
 Michelle Osborne
 Nancy Parker
 Linda Pearson
 Laily Pirhbai
 Darren Pries-Klassen
 Beth Proven
 Doug Puffer
 Michelle Regel
 Christopher Richardson
 Jo-Anne Ryan
 Brian Shea
 Amanda Stacey
 Bob Strachan
 Dee Dee Sung
 Keith Thomson
 Silvia Ugolini
 Ann Vessey
 Shelley Waite
 Janice Williams
 Ross Young

"Working with the CAGP members has given me more purpose and meaning in my business. I am now partnering with other CAGP members to make a difference in our community by helping people make a bigger charitable imprint."

*Glenn Stewardson, CFP, FMA -
 The Donor Motivation Program
 Nova Scotia*

National Staff

Ruth MacKenzie, President & CEO

Lara Kinnear, Executive Assistant and Membership Coordinator

Erin Kuhns, Professional Development Coordinator

Jean-Marie Niangoran, CPA, CMA, Financial Manager

Anastasia Smolentseva, MComm, Manager, Communications & Stakeholder Relations

Chapter Executives



Vancouver Island

Shamim Pirani, Chair
 Laurie Palmer, Leave a Legacy Chair
 Cheryl Hebb
 Jennifer Jasechko
 Amber Adams
 Don Gordon
 Gwen Chapman
 Sarah Millard
 Joanna Verano
 Sara Neely

Greater Vancouver

Jocelyn Anderson, Co-Chair
 Paola Coronado Hass, Co-Chair
 Julia Roudakova, Leave a Legacy Chair
 Michelle Bernard
 Calvin Fong
 Jerry Halma
 Robert Gagliano
 Dee Dee Sung
 Esther Jang
 Susan McAlevy
 Jane Westheuser
 Linda Ashton
 Lisa Haydl
 Raman Johal
 Yolanda Benoit



Alberta North

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 Sherry Schaefer, Co-Chair
 Colette Mandin, Leave a Legacy Chair
 Mien Jou
 Darlene Kowalchuck
 Noel Xavier
 Donna Roth
 Laura Svajlenko

Alberta South

Robert Locke, Chair
 Carla Gervais, Leave a Legacy Chair
 Cindy Neufeld
 David Beavis
 Carey Bornn
 Rizwan Nathoo
 Kathryne Gibson
 Tara Friesen
 Laurie Wallis
 Michelle Regel



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 Trina Mortson, Leave a Legacy Chair
 Melissa Mann

Saskatchewan South

Christina Attard, Chair
 Kaleta Strain, Leave a Legacy Chair
 Byron Troth
 Sharon Kremeniuk
 Trina Owens
 Kevin Peyson
 Leanne Posehn



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 Stephen Webb, Leave a Legacy Co-Chair
 Lynda Ruban, Leave a Legacy Co-Chair
 Jackie Markstrom
 Kathryne Cardwell
 Sarah Crowley
 Liz Kovach
 Patrick O'Connor
 Pat Lilley
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 Tim Jones, Leave a Legacy Chair
 Jody Maskery
 Kim Willis
 Martin Sobocan

Waterloo-Wellington

Marjorie Brown, Chair
 Darren Sweeney, Leave a Legacy Chair
 Craig Stevenson
 Heather Curran
 Lisa Short

Chatham-Kent

Jodi Maroney, Chair
 Jon Quaglia, Leave a Legacy Chair
 Michele Grzebiem-Huckson
 Hugh Logan
 Karen Kirkwood-Whyte

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 Devon Rowan, Leave a Legacy Chair
 Sandra Baker
 Lisa Gonnering
 Julie Powell
 Erin Matthews
 Ashley Davidson
 Sarah McPherson
 Deanna Pope
 Marla Smith
 Gena Dureault

Sarnia-Lambton

Robert Murray, Co-Chair
 Gus Mumby, Co-Chair
 Heather Allen
 Jane Anema

London

Don Cameron, Chair
 Trish Gergich, Leave a Legacy Chair
 Lisa Mazurek
 Jennepher Cahill
 Jill Osborne
 Susan Mitchell
 Melissa Derbyshire

Greater Toronto

Sandra Dow, Chair
 Angela D'Aversa, Leave a Legacy Chair
 Peter Ramsay, Leave a Legacy Chair, Temiskaming
 Marcella Zanella
 Frances Buczko
 Aruna Aysola
 Marisa Barlas
 Serena Hak
 Meredith Meads
 Emelita Ervin
 Don Allen
 Ann Gorwill
 Jessica Rode
 Alanna Jones



Nova Scotia

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 Bonnie Boyd-Reed, Leave a Legacy Chair
 Lori Scott
 Sharon Crowe
 Crystal Aboud
 Ann Vessey
 Katharine Berrington
 Toni Croft
 Alyssa Feir
 Leslie Tinkham

Ottawa

Neil Leslie, Chair
 Katie Loftus, Leave a Legacy Co-Chair
 Jana Lee Rand, Leave a Legacy Co-Chair
 Paul Brousseau
 Joanna Luciano
 Marissa Crouteau



Prince Edward Island

Helen Chapman, Chair
 Myrtle Jenkins Smith
 Rosie Shaw

Greater Montreal

Marie-Anne Desjardins, Chair
 Lucille Grimard, Leave a Legacy Chair
 Alain Lévesque
 Nancy Langlois



Newfoundland and Labrador

Catherine Barrett, Chair
 Malcolm Sheppard, Leave a Legacy Co-Chair
 Roderick Fequet, Leave a Legacy Co-Chair

“Becoming a member of CAGP is one of the best things I've ever done to enhance my career. CAGP has provided the most comprehensive and focused education to learn more about gift planning in Canada. The conferences and workshops offered are second to none. Through my Chapter, I have also been able to connect with many local professional advisors and other planned giving professionals through the many seminars and networking opportunities they deliver. CAGP helped me help my donors make more informed choices about giving to the University. The connections I've made through CAGP are stronger than any others I've had in my professional life and I look forward to making many more.”

Nancy Parker, Chair, CAGP Windsor-Essex Chapter, Former Manager Campaign Operations and Special Projects, University of Windsor

Financial Health

We are pleased to present our summary financial statements for the year February 1-December 31, 2015, which were audited by McCay Duff LLP. The detailed auditor's report is available at www.cagp-acdp.org/annual-reports.

	2015 (11 Months)	2014/15 (Restated)
Revenue		
Conference fees	\$ 334,940	\$ 343,959
Membership fees	283,470	285,261
Education courses	172,643	183,365
Grants	75,000	95,000
Sponsorships	54,741	57,009
Job postings	18,390	19,000
Interest and other	16,339	12,438
	<u>955,523</u>	<u>996,032</u>
Expenses		
Salaries and wages	318,554	292,239
Conference expenses	231,095	259,721
Administration	43,258	35,318
Partner fees	41,147	65,968
Education and honorariums	32,404	28,466
Professional fees	32,253	21,222
Website and computer	31,999	23,489
Travel	25,895	19,408
Rent	20,900	23,200
Accommodation	20,488	14,420
Meals	19,133	28,595
Management fees	12,681	51,041
Translation	10,246	6,847
Telephone and fax	9,268	11,824
Printing	7,847	3,530
Meeting facilities	4,164	1,232
Amortization	2,859	3,230
Financial professionals research project	-	22,500
	<u>864,191</u>	<u>912,250</u>
Revenue (Expenses) - National Office	91,332	83,782
Other		
Chapter revenue	225,175	466,419
Chapter expenses	385,425	452,170
	<u>(160,250)</u>	<u>14,249</u>
Net Revenue (Expenses) for the Year	\$ <u>(68,918)</u>	\$ <u>98,031</u>

Connect with Us

Canadian Association of Gift Planners

1188 Wellington Street West, Suite 201

Ottawa, Ontario K1Y 2Z5

Email: info@cagp-acdp.org

Tel: 613-232-7991 or 1-888-430-9494

www.cagp-acdp.org

[Subscribe to our eNews - click here](#)

Follow us on social media



"Taking the decision to become a member of CAGP has been one of the most important steps I have taken to enhance my network and create professional relationships, learn best practices, capture new ideas, and brainstorm with key achievers in strategic charitable giving. This professional association has been an essential resource to learning beyond my primary exposure to strategic charitable giving where I have met challenges with the knowledge that I am supported as I take risks."

*Kim Cavener, Manager of Legacy Gifts,
McGill University Health Centre
Foundation*