

# ANNUAL REPORT 2018



*A year of growth.*



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# 01 LEADERSHIP MESSAGE

Another year at CAGP has flown by at seemingly lightning speed. Given that 2018 was the final year of our three-year strategic plan and Amanda's term as Board Chair is drawing to a close, the sense of time passing is even more profound. Perhaps equally noteworthy is just how much we have accomplished in that time – 2018 in particular.

Our strategic plan 2016-2018 entitled *Building Our Future* was focussed on just that: ensuring the proper foundation and building blocks were in place to propel CAGP into a future of vitality and success. Our goals included ensuring strong and engaged Chapters, fortified financial capacity, improved communications and collaborations, and maximizing access to the high quality education that our members and constituents expect from CAGP.

Building on some key successes, in particular the establishment of the CAGP Foundation, the CAGP Board decided that 2018 would be a year of calculated risk and strategic investment, with a measured dip into reserve funds to support some key activities and enable our team to grow in order to meet growing demands.

In this Annual Report, we're pleased to share highlights about the first-ever Symposium of CAGP's Chapter Chairs, designed to support our crucial local leaders, and deliberations held over the future direction of CAGP's government relations work to ensure our continued influence on tax policy as it relates to charitable giving. We're thrilled to highlight how our augmented staff team is allowing us to scale up and out, and how through a new partnership, we've

been able to offer something many members have been urging us to provide for some time – a professional designation for advisors in philanthropy.

As the CAGP Board engaged in strategic planning discussions this fall, and as we prepare to release a new plan in the coming months, it is exhilarating to speculate on a future from a position of greater strength, capacity and resources.

In our view, there are few organizations that have achieved what CAGP has in recent years. That is, without a doubt, because of the collective passion, dedication and contribution of all who are a part of this very special association.



Amanda Stacey  
Chair of the Board



Ruth MacKenzie  
President & CEO



## 02 OUR BOARD



**Amanda Stacey**  
Chair



**Michelle Osborne, CFRE**  
Vice Chair



**Ninette Bishay, CPA, CA**  
Treasurer



**Beth Proven**  
Secretary



**Dr. Carla Funk**



**Geoff Graham**



**Jill Nelson**



**Heather Powers**



**Conor Tapp**



**Keith Thomson**

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# 03 2018 HIGHLIGHTS



Establishing a partnership with Knowledge Bureau and Spire Philanthropy to launch the Master Financial Advisor in Philanthropy (MFA-P) designation.





Another sold out national conference. This year was our 25<sup>th</sup> held in Winnipeg, Manitoba.



We welcomed a new VP, Education & Development to drive our growth.



CAGP conducted a membership survey. Highlights included:

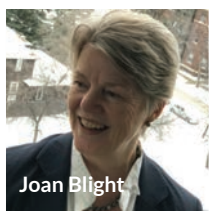
-  The top three reasons people join CAGP are (1) networking, (2) local offerings, and (3) national education
-  CAGP gives our members a feeling of camaraderie, especially when our regular working environment makes us feel isolated.



Publication of the *Doing Good For Business* report, in partnership with Alberta South and Greater Vancouver CAGP Chapters, the Toronto Foundation, the Vancouver Foundation and Philanthropic Foundations of Canada.

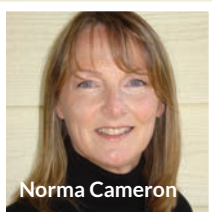


In Government Relations, our CEO was invited to co-present to the Special Senate Committee on the Charitable Sector along with Mr. Donald K. Johnson.

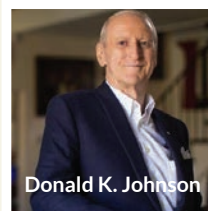


## FRIEND OF CAGP AWARD

Since 1997, forty-two individuals who exemplify the spirit and vision of CAGP have been recognized with the Friend of CAGP Award. In 2018, Joan Blight and Norma Cameron were acknowledged for their national impact on the field of strategic charitable gift.



[READ MORE](#)



## LIFETIME ACHIEVEMENT AWARD

In 2018, Donald K. Johnson became the second recipient of CAGP's Lifetime Achievement Award in acknowledgement of his lifelong commitment to strategic philanthropy and gift planning, and his tireless advocacy for tax incentives that support charitable giving.

[READ MORE](#)



# 04 DEVELOPING KNOWLEDGE AND PROVIDING EDUCATION

CAGP's reputation for delivering best-in-class education continued to strengthen in 2018, with an almost 20% growth in the number of professionals accessing courses, webinars and the national conference. Our Chapters collectively saw similar year-over-year growth, confirming that CAGP members look to us for education and learning to support them along their career path.

Mid-way through 2018 a strategic decision was made for the CAGP Foundation to assume leadership on education. Its early success has enabled the Foundation to embrace this part of its mission, while working with CAGP to leverage our networks and take the lead in knowledge dissemination. While this shift is likely not noticeable to participants, it will allow CAGP to focus more intentionally on our Chapters, members and networks as well as our important work in government relations.

Free webinars available to CAGP members and non-members have proven to be a successful way to showcase our expertise, and in 2018 the bi-annual Advanced Gift Planning Symposium again provided a high-level learning opportunity on the current issues and trends impacting strategic charitable gift planning. Other highlights follow.

## GROWTH OF GIFT PLANNING FUNDAMENTALS COURSE

In 2017 CAGP launched a renewed curriculum for our signature one-day Gift Planning Fundamentals course, and with the added capacity of the new staff faculty, we were able to offer the course to both the public, and now a significant number of private in-house custom presentations during 2018.

## SPREADING GIFT PLANNING KNOWLEDGE IN CANADA

CAGP staff delivered local presentations on strategic charitable gift planning to 6 charitable organizations and associations including AFP Congress, 2 Estate Planning Councils, 3 regional advisor groups like CPA and Advocis, 3 accounting firm charity education days including keynotes at 4 advisor conferences and 4 post-graduate college fundraising programs as well as Carleton University's Master of Philanthropy & Nonprofit Leadership program.

Webinars on strategic charitable gift planning with charity partners like Community Foundations of Canada and advisor partners like CPA Canada have also been provided.



# 04 DEVELOPING KNOWLEDGE AND PROVIDING EDUCATION

## PLANNED GIVING FOR CANADIANS EBOOK - A RENEWED RESOURCE FOR CAGP

Co-authored by Dr. Frank Minton, PG Calc Senior Advisor, and Lorna Somers, Director of Advancement at McMaster University, and now in its third edition, publishing rights to this book were generously gifted to CAGP in 2018. This year's update has seen a new look and added content after the last Federal Budget. CAGP wishes to thank Miller Thomson LLP for their partnership and for continued support in updating the tax and legal portions of this vital resource. The ebook is now available to members for download on our website and for purchase by non-members.



[DOWNLOAD THE EBOOK](#)

## PROFESSIONAL DEVELOPMENT IN NUMBERS

Over 2018, we had 2776 registrations for national courses, events, and webinars. Here is the breakdown:

- Original Canadian Gift Planning course in Wakefield, QC: 40 professionals (sold out)
- Strategic Gift Planning Bootcamp in Victoria, BC: 36 professionals (sold out)
- Advanced Canadian Gift Planning Symposium in Ottawa, ON: 44 professionals
- Gift Planning Fundamentals was held 9 times and attended by 215 people in total

- Leadership in Turbulent Times (pre-conference course) in Winnipeg, MB: 18 people
- Webinar Wednesdays: 1740 registrations
- 25<sup>th</sup> National Conference in Winnipeg, MB: 304 attendees
- Free webinars: Explore the Impact of the GRE Regime on Charitable Giving: 313 people. And the Beat Goes On – Legacy Marketing in the 21<sup>st</sup> Century: 556 people

At the local level, our Chapters held 87 events across the county, attended by 1575 professionals in gift planning

We are deeply grateful to our National Education Committee for their deep commitment to evolving education on gift planning in Canada through CAGP.

## ESTABLISHING THE MASTER FINANCIAL ADVISOR IN PHILANTHROPY DESIGNATION

We established a partnership with Knowledge Bureau and Spire Philanthropy to launch the Master Financial Advisor in Philanthropy designation. This might be one of the most exciting things that CAGP has accomplished this decade. After years of nudging by our members for such a program, it's one of those initiatives that was only possible through collaboration. As the inaugural group begins the program in early 2019 and we look to the future possibilities the MFA-P brings to philanthropy, we know this program will embody one of our CEO's favourite mantras: Think big. Start small. Scale up.



# 04 DEVELOPING KNOWLEDGE AND PROVIDING EDUCATION

## 25<sup>TH</sup> NATIONAL CONFERENCE

“Come Explore the Future of Generosity” was held in Winnipeg, Manitoba with 304 attendees from across the country and across the sectors. The continuing support of Assante Private Client as our Premier Sponsor made this year’s conference a huge success, with registration selling out before the early bird deadline.

We thank the Local Host and Program Committees for making it a vibrant and successful event. In addition, Diane Laundy was recognized for her outstanding work and commitment to the CAGP National Conference, with the 2018 conference being her 20<sup>th</sup> year planning the event.



### LOCAL HOST COMMITTEE

Rena Molinari - CO-CHAIR  
Stephen Webb - CO-CHAIR  
Sara Crowley  
Janice Feuer  
Ruth MacKenzie  
Irma Mckenzie  
Lorri Podolski  
Beth Proven  
Donna Wilford

### PROGRAM COMMITTEE

Charles O'Neil - CHAIR  
Sarah Crowley  
Leah Eustace  
Denise Fernandes  
Ryan Fraser  
Aneil Gokhale  
Erin Kuhns  
Ruth MacKenzie  
Rena Molinari  
Jill Nelson  
Silvia Ugolini  
Steven Webb  
Janice Williams  
Marcella Zanella

### SPONSORSHIP COMMITTEE

Chris Chipman  
Garth Johnson  
Ruth MacKenzie  
Beth Proven  
Stephen Webb





## 05 BUILDING AWARENESS AND PROMOTING PHILANTHROPY

CAGP has had a long and productive history with the “Leave A Legacy” brand. Chapters across Canada have been engaging with their communities to promote strategic philanthropy, the importance of bequests and the power of leaving a legacy. Historically, this has been a grassroots effort, however the time has come for a re-imagined and re-invigorated national Leave A Legacy approach, which will begin with the formation of a new national Leave A Legacy committee and will be enhanced by our communications efforts at the National Office.

CAGP also recognizes that having more professional advisors of all kinds engaged in the cause of philanthropy raises the opportunity for impact. While continuing to promote the key messages from our 2014 study, *The Philanthropic Conversation*, that donors look to their advisors for advice on strategic charitable gift planning, we recognize that it’s vital for advisors to see the greater “business case” of philanthropy. In 2018 we released a compelling new product to our suite of advisor resources: *Doing Good for Business –The inclusion of philanthropy in the professional advisor’s business practice*, presenting case studies of advisors who have strategically and successfully, and with great professional satisfaction, harnessed the opportunity of being a philanthropic advisor.



# 06 CREATING CONNECTIONS AND FACILITATING PARTNERSHIPS

## CREATING CONNECTIONS AT THE CHAPTER CHAIRS' SYMPOSIUM

September 2018 was the first time that CAGP Chapter Chairs had been convened together for in-person learning and sharing. In opening remarks, President & CEO, Ruth MacKenzie shared her vision of Chapters as a vital component of CAGP executing on our shared mission at the local level.

With nineteen of twenty Chapters participating as well as the entire CAGP Board of Directors and key members of the national team, the Symposium enabled the national body to understand more deeply the needs and challenges facing both our large and small Chapters, what is unique, and what similar issues they face. One of the strongest messages to come from the larger Chapters was to collaborate with the National Office and other larger Chapters on the programing, engagement, professional advisors, awards and consistent messaging and narrative.

All-in-all, the Symposium was an outstanding success and we look forward to holding this event biannually into the future.

## STRATEGIC CHAPTER VISITS AND SUPPORT

More in-person visits to local CAGP Chapters was a priority for the National Office in 2018, with several visits taking place in the fall. Discussions with Chapter Executives were held in order to gather feedback on how to support these Chapters specifically and the network of Chapters as a whole. The outcomes of these visits and the Chapter Symposium will inform how we work to improve our Chapter support moving forward.

In 2018, we were privileged to visit the following Chapters:



# 07 CHAPTER EXECUTIVES

CAGP's development and success relies heavily on the 20 Chapters across Canada that are led by 153 passionate professionals in gift planning. We can't thank them enough for their dedication and hard work!

## VANCOUVER ISLAND

Don Gordon - CHAIR  
Michelle Johnson  
Gwen Chapman  
Deborah Walker  
Stephanie Rowe  
Joanna Verano  
Natasha Benn  
Hilary Abbott  
Gillian Donald  
Laurie Bienert  
Yvette Guigueno  
Cheryl Hebb  
Laurie Palmer

## KAMLOOPS

Danalee Baker - CO-CHAIR  
Karen Gamracy - CO-CHAIR  
Margaret Chrumka  
Alisa Coquet  
Nena Jovic-Andrejevic  
Shelby Lomas  
Sarah Sandholm

## GREATER VANCOUVER

Jane Westheuser - CHAIR  
Aimée Lindenberger  
Michael Blatchford  
Mike Todd  
Nicole Jeschelnik  
Janice Williams  
Darius Maze  
Rosaline Chan  
Kris Love  
Jeff Sodowsky  
Marianne Ciok  
Darya Sawycky  
Jim Bindon

## ALBERTA NORTH

Sherry Schaefer - CHAIR  
Terry Tobin  
Barb Noble  
Darlene Kowalchuk  
Leona Yez  
Matt Mandrusiak  
Laura Svajlenko  
Deborah McKinnon

## ALBERTA SOUTH

Sheelagh Mercier - CHAIR  
Neil Williams  
Ross Young  
Kathryne Gibson  
Rob Locke  
Kevin Davidson  
Alen Okanovic  
Susan Deike  
Shirley Yurchi  
Heather Berezowski

## SASKATCHEWAN NORTH

Stacey Schewaga - CHAIR  
Vicki Corbin  
Jay Stark  
Melissa Mann  
Trina Mortson

## SASKATCHEWAN SOUTH

Trina Owens - CHAIR  
Kurtis Krug  
Kaleta Strain  
Leanne Posehn  
Ticia Heward  
Jeff Norwig

## MANITOBA

Pat Lilley - CHAIR  
Sarah Crowley  
Jackie Markstrom  
Mia Dunn  
Lynda Ruban  
Patrick O'Connor  
Rena Molinari  
Janice Feuer  
Allison Cranmer

## OTTAWA

Beatrice (Bea) Olivastri - CHAIR  
Paul Brousseau  
Katie Loftus  
Nadine Fowler  
Michael Caldwell  
Jenny Mitchell  
Megan Doyle Ray  
Holly Greatrex

Doug Puffer  
Maurice Prevost  
Betty-Anne Howard  
Anastazia Krneta  
Mitch Miller  
Daniel Clapin  
Gillian Whyte

## GREATER TORONTO

Serena Hak - CHAIR  
Aneil Gokhale  
Mikhael Bornstein  
Janice Correa  
Ann Gorwill  
Winsor Pepall

Sandra Dow  
Tammy Garcia  
Jackie Cooper  
Emelita Ervin  
Alanna Jones  
Abdesh Furmah

## SARNIA-LAMBTON

Jane Anema - CHAIR  
Gus Mumby

Dave Brown

## NIAGARA/GOLDEN HORSESHOE

Ricky Piedrahita - CHAIR  
Shauna Reid  
Julie Jelinek  
Joanne Harris-Bedford  
Darlene Bennett-Howes

Carrie Gemmill  
Tracy Geoffroy  
Joan Cosby  
Trevor Cooper

## LONDON

Trish Gergich - CHAIR  
Gord Baptist  
Adam Chapman  
Linda O'Connor

Justin Pilon  
Vicki Hayter  
Sue Hardy

## CHATHAM-KENT

Angela Corso - CHAIR  
Margery Muharrem  
Lisa Caron

Jodi Maroney  
Rhian Reilly

## WATERLOO-WELLINGTON

Jessica Wroblewski - CHAIR  
Heather Curran

Craig Stevenson

## WINDSOR AND ESSEX COUNTY

Kim Willis - CHAIR  
Martin Sobocan  
Nancy Parker

Patricia Valleau  
Katie Mazzuca

## GREATER MONTREAL

Kim Cavener - CHAIR  
Alexis Gaipman  
Francine Cardinal  
Peggy Killeen

Antoinetta Nicolò  
Jeremy Hampson  
Lucille Grimard

## NEWFOUNDLAND AND LABRADOR

Mike Kidney - CHAIR  
Catherine Barrett

## PEI

Helen Chapman - CHAIR  
Myrtle Jenkins Smith  
Rosie Shaw

## NOVA SCOTIA

Lori Scott - CHAIR  
Doris Cameron  
Liz Finney  
Katharine Berrington  
Arleen Stevens  
Geoff Graham

Beverly Purcell  
Toni Croft  
Alyssa Feir  
Sara Burke  
Ian Lewer



## 08 ENGAGING IN NATIONAL DIALOGUES AND INFLUENCING PUBLIC POLICY

In 2018 we continued to ensure that CAGP's voice was raised on issues pertaining to tax policy and philanthropy. With leadership and guidance from our esteemed Government Relations Committee CAGP expressed our support for Donald K. Johnson's advocacy for a capital gains exemption on charitable gifts made from the sale of real estate and private company shares. We also suggested streamlining the process for direct gifts made from RRSPs/RRIFs, and offered our support to the Special Senate Committee on the Charitable Sector. Our CEO, Ruth MacKenzie, was later invited to co-present to the Special Committee, along with Donald Johnson, and a member of the Senate Committee presented to and consulted with CAGP members of the Advanced Gift Planning Symposium.

CAGP continues to be part of broader policy discussions taking place in the sector, with the participation of our CEO and Board Chair, Amanda Stacey, in the fourth annual Charities Day on the Hill in Ottawa.

Perhaps most pertinent in 2018, the CAGP National Board and Government Relations Committee engaged in a full-day discussion on the future of government relations at CAGP, developing a strategy that includes: research that articulates impact of gift planning vehicles; identifies opportunities for collaboration; enhances communication with and engagement of CAGP members and Chapters; and articulating our "GR story" in a strong case for support to enable us to secure resources to activate. We anticipate this being a key action area in our upcoming strategic plan.

### GOVERNMENT RELATIONS COMMITTEE

Grant Monck - **CHAIR**

Malcolm Burrows

Terrance Carter

Mark Goldbloom

Elena Hoffstein

Robert Kleinman

Brenda Lee-Kennedy

Janice Loomer Margolis

Ruth MacKenzie

Susan Manwaring

Margaret Mason

Elizabeth Moxham

Brad Offman

Michelle Osborne

Laily Pirbhai

Christopher Richardson

Jo-Anne Ryan

Amanda Stacey

Silvia Ugolini

Ross Young



## 09 SPONSORS, FUNDERS, PARTNERS

Abundance Canada

Advocis

The Asper Foundation

Artmarketing Services Inc.

Assante Private Client

Blackbaud

Blackwood Family Enterprise Services

BMO Wealth Management

Cardinal Capital Management Inc.

Carters Professional Corporation

City of Winnipeg

Dimension Display

DLA Piper

The Donor Motivation Program®

DonorPerfect

Drache Aptowitz LLP

Environics Analytics

Environment and Climate Change Canada

Fasken Martineau DuMoulin LLP

Global Philanthropic

Good Works

Great-West Life Assurance Company

Knowledge Bureau

Legacy Leaders

Miller Thomson LLP

MLT Aikins LLP

Norton Rose Fulbright Canada

The Offord Group

PGgrowth

PearTree Financial Services Ltd.

Philanthropic Foundations of Canada

RBC Wealth Management and PH&N  
Investment Counsel

RGF Integrated Wealth Management

Scotia Wealth Management

SickKids Foundation

Strategic Philanthropy Inc.

TD Wealth

United Way Centraide Canada

University of Manitoba

The Winnipeg Foundation

Thompson Dorfman Sweatman LLP

Toronto Foundation

Vancouver Foundation

Tourism Winnipeg

CAGP's sponsors, funders and partners play a key role in our organization. They enhance our financial and engagement capacities, enabling us to undertake new exciting projects and to continue delivering solid results on current activities. We sincerely thank them for their generosity and support of our vision and mission.



# 10 ANNUAL REPORT FROM THE CAGP FOUNDATION

## OUR MISSION

To financially support the development and promotion of excellence in strategic, charitable gift planning in Canada.

In 2016 CAGP was at a crossroads. The demand for development at the local level, educational offerings and government relations work had continued to rise, without the growth in resources to match it. The CAGP Foundation was created to address this need.

## BUILDING ON OUR SUCCESS

The strength of support the CAGP Foundation received in 2017, its first year of existence, had sent a clear message that this was a cause whose time had come. 2018 was a year to take root and grow.

## THE RESULTS

In 2018 we raised over \$377,000 in outright gifts and pledges. Significant gifts included a \$75,000 pledge from the Benefaction Foundation, and one of \$30,000 from Board member and tireless volunteer Keith Thomson and The Donor Motivation Program®. Our actual revenue for 2018 was just over \$205,000. Our endowment at The Winnipeg Foundation was increased by \$7,056 bringing it to a total of \$16,359. We also raised \$79,500 through the engagement of a number of community foundation and corporate Supporters.

The focus of our attention and efforts in 2018 was on sustainability. We are delighted to report that 46% of our donors chose to support us in the form of a pledge. We are also deeply grateful for the many generous outright gifts we received this year from brand new supporters as well as many of our Founding Donors.

And there is the ultimate gift – the one that stands at the core of what we believe in as advocates of strategic philanthropy. Five visionary individuals have done us the great honour of making us a part of their legacy.

## INVESTING IN CAPACITY

In today's world, nonprofits are often challenged to present a case for investing donor dollars in building their own capacity. At the CAGP Foundation we are fortunate to have many supporters who understand that investing in capacity means greater accomplishment in the programs and initiatives we deliver. The \$500,000 pledge made in 2017 by Donald K. Johnson bore testimony to that and, together with the support of all our donors, has allowed us to scale up and have a greater impact on what we can deliver.

In 2018 we engaged with CAGP to deliver an education program which will grow our best-in-class offerings exponentially. This enabled them to hire a Vice President, Education & Development in June to focus on increasing the education market and curriculum to deliver in more communities, to more organizations and with new stakeholder audiences.

We also received generous pledges for specific funding to allow us to contract the services of a part-time Development Director in October, ensuring that the Foundation continues its upward trajectory.

The CAGP Foundation's support for educational programming has enabled CAGP to direct more resources towards its other strategic activities, including strengthening CAGP's local Chapters so that they can build capacity in their communities, and place a greater focus on government relations activities.



# 10 ANNUAL REPORT FROM THE CAGP FOUNDATION

## PLANNING FOR THE FUTURE

In 2018 we asked our members and champions to consider making multi-year pledges to uphold a strategic, long-term, viable program, and many answered the call. We will continue to reach out for support from individuals and organisations whose values align with ours, those who believe that strategic philanthropy enables more Canadians to give more to the communities and causes they care deeply about.

As CAGP embarks on the next strategic plan, the success of the CAGP Foundation means that it will be built on a foundation of greater strength and capacity. We will be one step closer to reaching CAGP's and the CAGP Foundation's shared vision of a better world through strategic charitable giving.

Thank you to all our Donors and Supporters for your confidence in us, and for your generosity. We could not do this without you.

In 2018, a team of dedicated volunteers from all over the country worked hard to maintain our momentum and to build on our success.

## CAGP FOUNDATION BOARD

Darren Pries-Klassen - **CHAIR**  
Andrew Valentine - **SECRETARY**  
Ross Young - **TREASURER**  
Greg Lichti  
Joan Blight  
Keith Thomson  
Beth Proven

## ADDITIONAL VOLUNTEERS

Lorraine Decock  
Charles O'Neil  
DeWayne Osborn  
Michelle Osborne  
Marilyn Monson  
Sara Neely  
Jill Nelson

“**Nicola Elkins, CEO & Founder, Benefaction Foundation**

*With such close alignment in our mission and values, it was a simple decision to offer our financial support to the CAGP Foundation. Focusing on education to reinforce the competencies of gift planning professionals promotes the growth and development of effective charitable giving in Canada, something which matters a great deal to our Board. Our wish is to support the capacity of the CAGP Foundation, to enable a strong, sustainable future for CAGP.*

**Sandra Dow, VP Philanthropic Giving, Arthritis Society**

*Supporting education and research on legacy giving through the CAGP Foundation gives me a role in enabling more Canadians to dream of the future they'd like to create through philanthropy.*

**Beth Proven, VP Development, Winnipeg Symphony Orchestra**

*I made a planned gift through my RRSP to the CAGP Foundation because I've spent my entire career seeing how legacy gifts make an extraordinary difference to the fabric of our society, and it was learnings through CAGP that gave me the knowledge and expertise I needed to be able to work in this rewarding field.*



# 10 OUR DONORS AND SUPPORTERS

We're eternally grateful to our growing donor family and our Founding Donors for demonstrating their belief in the vision we share with CAGP of a better world through strategic charitable giving.

## \$500,000

Donald K. Johnson

## \$50,000+

Benefaction Foundation

## \$25,000+

The Donor Motivation Program®

## \$10,000+

Susan Manwaring

## \$5,000+

Carters Law Firm  
Jeremy Hampson  
Ruth MacKenzie  
Darren & Monika Pries-Klassen  
Robert Strachan  
Ross & Alison Young

## \$2,500+

Calvin Fong  
Geoff C. Graham & James B. Tee  
Peggy Killeen  
Roger Lee  
Tony Lee  
Greg Licht  
Margaret Mason  
Grant Monck  
Sara Neely  
Jill Nelson  
Michelle M.B. Osborne  
Beth Proven  
Amanda Stacey  
Jasmine Sweatman  
Andrew Valentine

## \$1,000+

Joan Blight  
Sandra Dow  
Leah Eustace  
Doug & Carla Funk  
Paul & Chastity Nazareth  
Charles O'Neil  
Doug Puffer  
Christopher & Alison Richardson  
Gregory Snider  
Lorna Somers  
Jay Stark  
Conor Tapp  
David Woo

## \$500+

Malcolm Berry  
Malcolm Burrows  
Michael Caldwell  
Doris Cameron  
Bruce Davies  
Ian Fraser  
Diane Laundry  
Marilyn Monson  
Julia Roudakova  
Tina Tehranchian  
Janice Williams  
Marcella Zanella  
*and one donor who preferred to remain anonymous*

## \$250+

Eli Clarke  
Jacqueline Cooper  
Paola Coronado Hass  
Liza Fernandes  
Janice Feuer

Leila Fiouzi  
Murray Landa  
Linda Lindsay  
Jackie & Kurt Markstrom  
Chelsea McIntyre  
Brad Offman  
Ligia Peña  
Laily Pirbhai  
Heather Powers  
Lynn Whetham

## \$100+

Yolanda Benoit  
Michelle A. Bernard  
Ninette Bishay  
Joan Cosby  
Colleen DeJager  
Mia Dunn  
André Franche  
James Hilborn  
Jennifer Jasechko  
Brenda Lee-Kennedy  
Phil Levson & Sherry Dahl  
Janice Loomer Margolis  
Meredith Meads  
Maurice Prevost  
Thomas G. Riglar  
Sue Rosenblat  
Jo-Anne Ryan  
Anne Thibodeau  
Vancouver Island Chapter of CAGP  
Jennifer Walsom  
Neil Williams  
Leona Yez  
*and one donor who preferred to remain anonymous*

## UP TO \$100

Jane Anema  
Kate Bake-Paterson  
Renee Beneteau  
Kim Cavener  
Simona Dobransky  
Rory Green  
Cheryl Hebb  
Pat Lilley  
David Love  
Jenny Mitchell  
Elizabeth Moxham  
Alen Okanovic  
Jen Pederson  
Charlene Taylor  
Jessica Wroblewski  
*and three donors who preferred to remain anonymous*

## LEGACY DONORS

Ruth MacKenzie  
Chelsea McIntyre  
Paul C.S.C. Nazareth  
Beth Proven  
Keith Thomson

## SUPPORTERS

Cardinal Capital Management  
TD Wealth  
Toronto Foundation  
Vancouver Foundation





# 11 FINANCIAL HEALTH

	National Office	Chapters	CAGP Foundation	Total 2018	Restated Total 2017
<b>REVENUE</b>					
Conference fees	\$ 411,197	\$ -	\$ -	\$ 411,197	\$ 425,325
Membership fees	298,297	-	-	298,297	301,319
Education courses	127,814	-	167,271	295,085	131,223
Leave A Legacy sponsorships	-	229,679	-	229,679	209,150
Donations	-	-	204,614	204,614	204,093
Chapter events	-	74,094	-	74,094	67,941
Job Postings	32,738	-	-	32,738	32,233
Sponsorships	17,000	8,995	-	25,995	26,971
Interest and other	10,268	4,926	-	15,194	17,413
	<b>\$ 897,314</b>	<b>\$ 317,694</b>	<b>\$ 371,885</b>	<b>\$ 1,586,893</b>	<b>\$ 1,415,668</b>
<b>EXPENSES</b>					
Salaries and benefits	\$ 339,225	\$ -	\$ 106,176	\$ 445,401	\$ 349,139
Conference expenses	356,303	-	-	356,303	350,569
Leave a Legacy	-	196,180	-	196,180	188,964
Professional fees	65,324	-	34,293	99,617	46,243
Chapter events	-	89,267	-	89,267	77,148
Administration	37,271	43,011	8,246	88,528	85,169
Meals	29,695	-	28,944	58,639	15,410
Accommodations	28,904	-	25,740	54,644	8,593
Travel	25,330	-	14,333	39,663	16,329
Rent	30,257	-	7,200	37,457	33,481
Office	26,300	-	9,433	35,733	27,940
Memberships and honourariums	25,285	-	6,000	31,285	33,510
Partner fees	7,950	-	-	7,950	26,300
Translation	5,174	-	-	5,174	6,352
Meeting facilities	2,226	-	-	2,226	843
	<b>\$ 979,244</b>	<b>\$ 328,458</b>	<b>\$ 240,365</b>	<b>\$ 1,548,067</b>	<b>\$ 1,265,990</b>
<b>NET REVENUE (EXPENSES) FOR THE YEAR</b>	<b>\$ (81,930)</b>	<b>\$ (10,764)</b>	<b>\$ 131,520</b>	<b>\$ 38,826</b>	<b>\$ 149,678</b>



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