

Benefits of CAGP-ACPDP™ membership

CAGP-ACPDP™ is the only national association dedicated to the strategy of planned giving, with over 1,400 members across Canada. Some benefits of membership include:

- Valuable networking opportunities through local Chapters
- A respected Code of Ethics
- Mentoring and idea sharing
- Exclusive and essential resources and communications
- Member-only access to current technical expertise
- National education offerings (conference and courses)
- Reduced member fees to national educational offerings
- Earn continuing education credits
- Discounted partnership member benefits

CAGP-ACPDP™ can help you position yourself as a planned giving advisor

- Become part the gift planning world – position yourself as a subject-area expert
- Gain knowledge and specialization in planned giving and enhance your value to clients
- Take advantage of speaking opportunities at local Chapters and the national conference on your area of expertise as it relates to planned giving
- Nurture relationships with other members of the charitable sector

For more information, contact:

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Make a Difference in the Lives that Follow



Helping individuals and families maximize the impact of planned giving



LEAVE A LEGACY™

A program of the Canadian Association of Gift Planners

THE
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STRONGER COMMUNITIES TOGETHER™

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LEAVE A LEGACY™
A Program of
CAGP • ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIES

Planned giving as part of the financial planning process

The majority of Canadians contribute to charitable organizations throughout their lives in some way or another. Few individuals or families, however, do it in a planned, well-thought-out manner. Most people need the advice and expertise of financial services experts to make their wishes a reality. They need your guidance to help to make it happen. There is a significant opportunity for advisors to help make planned giving part of their clients' financial or estate plans.

You can help your clients support their favourite charitable organization in more significant ways and maximize the impact of their giving. You can also help them protect the value of their estates by avoiding erosion due to taxes, probate and administration fees.

When you make planned giving part of the financial planning process, you help your clients balance their personal, family and philanthropic goals. You also deepen your client relationships. And, you help charitable organizations making important differences in our communities.

*We make a living
by what we get,
but we make a life
by what we give.*

WINSTON CHURCHILL

Planned giving options

In addition to the satisfaction that comes from contributing to the future of their favourite charitable organization, your clients can often achieve significant tax and estate planning benefits.

There are a number of options available. As a professional advisor, you can help your clients decide which option(s) will work best for them and their families.

Ways to leave a legacy

- Bequest
- Cash or securities
- Life insurance
- RRSPs or RRIFs (often a great tax advantage)
- Annuities
- Charitable remainder trusts
- Residual interest
- A gift in memory of a loved one
- Real estate
- A gift to honour someone
- Special occasion giving: to mark a wedding, Christmas, anniversary or birthday



What is LEAVE A LEGACY™?

LEAVE A LEGACY™ is a national public awareness program that encourages people from all walks of life to make gifts through a will, life insurance or other planning instrument to the charitable organizations of their choice. The goal of the program is to raise awareness of the importance of thoughtful, well-planned, tax-preferred gifts and their impact on the quality of life for everyone in our communities. The LEAVE A LEGACY™ program is designed to benefit all charities and non-profit groups large or small.

A program of the Canadian Association of Gift Planners (CAGP-ACPDPTM), LEAVE A LEGACY™ is a collaborative effort of donors, charities, not-for-profits and professional advisors. LEAVE A LEGACY™ promotes the practices of planned giving and aims to increase the number of planned gifts from donors to charitable organizations.

What is the Canadian Association of Gift Planners (CAGP-ACPDPTM)?

Formed in 1992 and formally incorporated in 1997, CAGP-ACPDPTM is the only organization in Canada that brings together charitable representatives with donor advisors in one professional association.

Among fundraising, legal and financial services peers, CAGP-ACPDPTM members are looked to as experts in charitable gift planning. They work with individual donors and their families to achieve their highest philanthropic goals through thoughtful, well-planned and tax-preferred giving.