



## *Client-Centered Consulting Services*

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**Marie Lizotte, CFRE** 613.228.8023

**Sue Widyaratne, BBA, CFRE** 613.823.7227, 613.297.5986

**Lizotte-Widyaratne Philanthropic Consulting Services** provides a range of services to individual philanthropists.

*To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter.*  
- Aristotle

This quote by Aristotle still holds true, especially in today's competitive fundraising environment. At any given time, there are numerous charitable organizations soliciting donors to finance capital projects, endowments and other programs. Our experience with speaking to hundreds of donors have shown that the majority of them are either frustrated by being solicited, confused about what they want to do, or are unaware of the options that are available to them when making decisions about supporting charitable causes.

With the right information, donors will be able to make informed decisions and create win-win opportunities for them and the charities they support.

Our services include:

- Providing research support to individual philanthropists in matching charitable causes with their philanthropic objectives.
- Providing advice and guidance on issues surrounding the decision to donate, what to avoid, designating the contribution, expectations of the charity, information on gift strategies, information on fundraising administrative costs, and other related information.
- Working with the client's other professional advisors to structure the most advantageous gift strategies.

We assure client confidentiality and any conflict of interest will be avoided.

Our goal is in helping clients meet their objectives by working closely with them and respecting time constraints and budgets. We are able to achieve this by being flexible and adapting to new and changing circumstances, always keeping the client's best interests in mind.



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### **Marie J. Lizotte, CFRE**



Marie is a bilingual, senior fundraising professional with over 25 years of experience in the healthcare, educational, cultural and humanitarian sectors. She is successful in team building and maximizing “people resources” through a supportive management style, and is respected as an ethical and donor-centered professional.

Marie has held senior management positions with McGill University; Art Gallery of Ontario; Branksome Hall Girls’ School; Royal Conservatory of Music (Toronto); University of Ottawa Heart Institute and the Canadian Red Cross. She has led multi-million dollar capital and endowment campaigns and has successfully implemented innovative major and planned giving programs.

Marie is a member of the Association of Fundraising Professionals and is also a founding member of the Canadian Association of Gift Planners.

### **Sue Widyaratne, BBA, CFRE**



Sue has worked in the charitable sector at the national and institutional levels for nearly 25 years. She has particular expertise in planned giving, endowments, donor recognition, and developing and implementing strategic and marketing plans. She has an excellent grasp of the technical aspects of gift planning, and has secured millions of dollars in major outright and deferred gifts.

She has held senior positions at the University of Ottawa Heart Institute Foundation, Canadian Nature Federation, Youth Science Foundation Canada, and Multiple Sclerosis Society of Canada.

Sue’s professional and volunteer affiliations include Canadian Association of Gift Planners, Leave a Legacy, Ottawa Estate Planning Council, Parkinson Society of Ottawa, and the Ottawa Tennis & Lawn Bowling Club.