



Adapting the Ask; encouraging generosity in a time of crisis



Paul Nazareth is a leader in Canada's philanthropic sector with over 19 years' experience. Currently the Vice President, Education & Development at the Canadian Association of Gift Planners, he was most recently was VP at the charity CanadaHelps where he worked with hundreds of environmental charities. He has been a philanthropic advisor with Scotia Wealth, and has spent many years as a fundraiser for charities. Paul is on the board of several charities, is Chair of the Advisory Board at the Humber College postgraduate fundraising program, on the Advisory Council of the Carleton Masters in Nonprofit Leadership program, a speaker in every Province with the Association of Fundraising Professionals, a faculty instructor to charities with CAGP and Advisors with the Knowledge Bureau. Paul writes on philanthropy for a variety of publications as well as appearing on national radio and television to speak about creating a personal legacy through charity.



Paul Nazareth

VP, Education & Development. Canadian Association of Gift Planners (CAGP)

Email: pnazareth@cagp-acpdp.org

LinkedIn <https://www.linkedin.com/in/paulnazareth/>

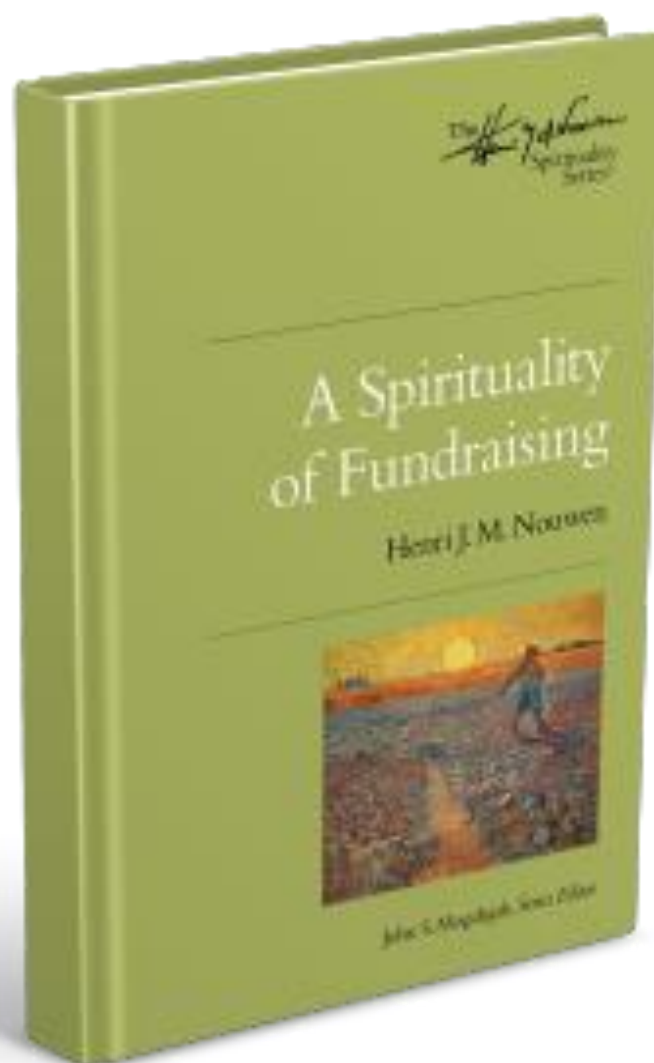
Twitter <https://twitter.com/UinvitedU>

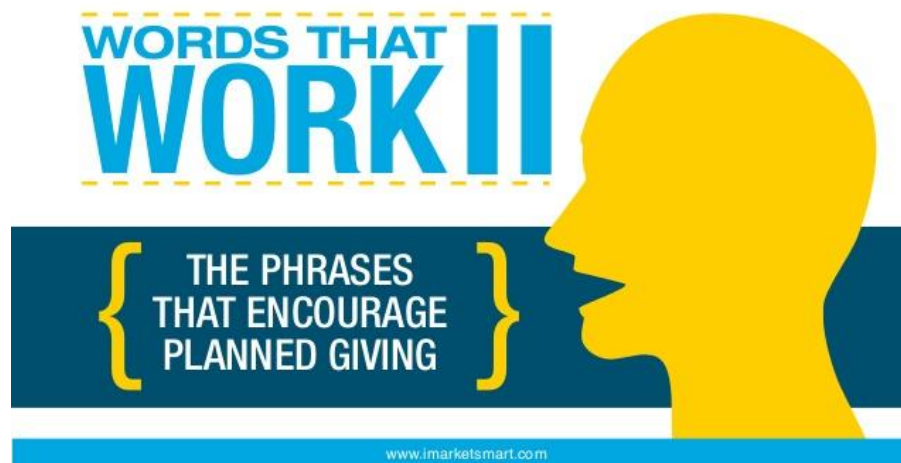
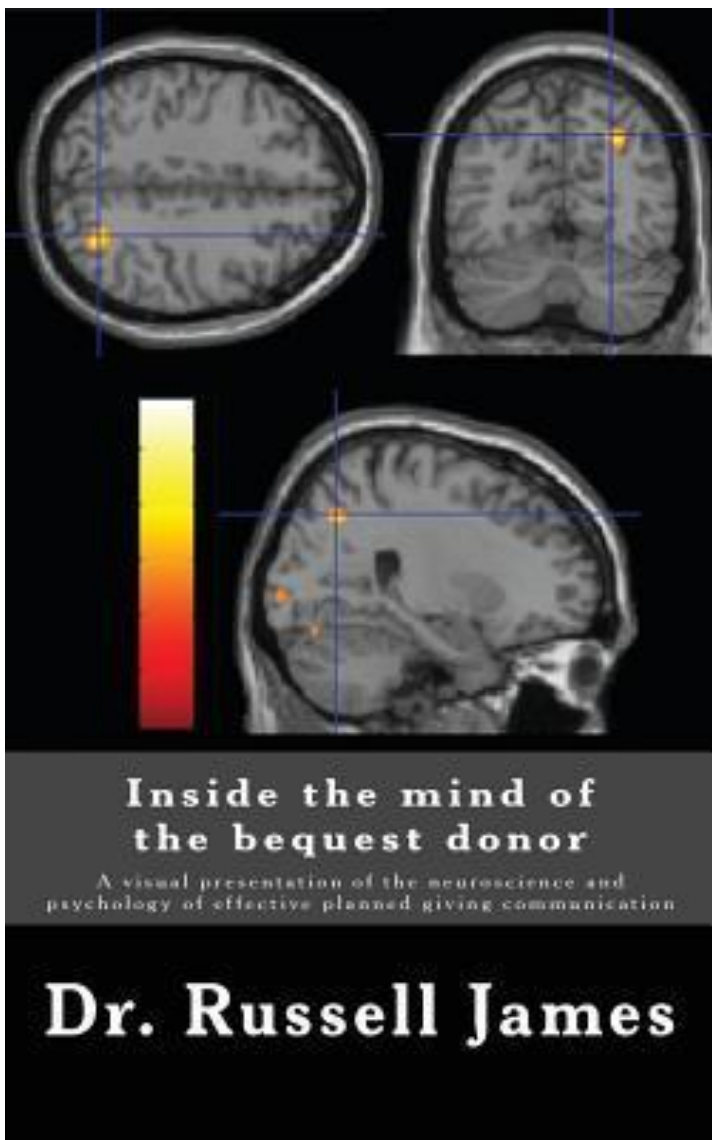
Instagram <https://www.instagram.com/nazarethnetworks/>

LOONIE

We've never been richer.
We've never been more miserable.
What's with that?!

John VanDuzer
reconciles faith
and finances





market  smart

TRUST

TWENTY WAYS TO BUILD
A BETTER COUNTRY



DAVID
JOHNSTON

28TH GOVERNOR GENERAL OF CANADA
AND THE AUTHOR OF
THE IDEA OF CANADA

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Hyperconnected World—and
How to Make It Work for You

NEW POWER

JEREMY HEIMANS
and HENRY TIMMS

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"Read this book when you're ready to stop taking your life for granted." **TANAH ORTEGO**

THE WELL- LIVED

LIFE

*Live with Purpose
and Be Remembered*

LYNDSAY GREEN

DRIVEN BY *Purpose*



32 Remarkable Stories about
Growing Your Wealth and
Leaving a Transformational Legacy

RYAN FRASER

CFP®, CIM, MFA-P™

CAGP has developed the following list of the skills and knowledge necessary for a Gift Planner to excel in this profession. They fall into two basic categories of competencies within the overall framework: enabling and technical, reflecting the major pillars within the gift planning profession. Why not take a few moments to review CAGP's Competency Framework and, using the checklist, identify the areas you wish to focus on for personal and professional development.

ENABLING COMPETENCIES

Relationship Building

- ☐ Develop trusted relationships that achieve a donor's vision for philanthropy, desire for a legacy and personal needs
- ☐ Active listening
- ☐ Comfort in asking for money
- ☐ Empathy, understanding and comfort with end-of-life discussions
- ☐ Translate complex technical, legal and tax language/concepts into plain language
- ☐ Work with donors as their needs determine
- ☐ Work effectively with donors' families and advisors
- ☐ Commitment to stewardship activities that reflect donors' wishes
- ☐ Connect the charity's mission to the donor's vision
- ☐ Cultivate networks with trusted legal, tax, financial advisors
- ☐ Develop trusted relationships with charity colleagues to access resources and support

Ethics & Judgement

- ☐ Adhere to the CAGP Code of Ethics
- ☐ Balance alignment of a donor's needs and desired legacy with competence, financial viability, family commitments, etc.
- ☐ Ability to understand and retain information, recognizing and respecting lines of confidentiality
- ☐ Recognize when to redirect a donor to a more appropriate giving vehicle and in the donor's best interests
- ☐ Identify and avoid conflicts of interest
- ☐ Understand the concept of 'no gift before its time'

TECHNICAL COMPETENCIES

Knowledge of Gift Planning Vehicles

- ☐ Securities, registered funds, insurance, annuities, gifts in kind, for current and deferred giving
- ☐ Advantage of corporate vs personal giving
- ☐ Explain opportunities and impact of each option for the donor
- ☐ How to determine fair market value of a charitable gift and know what information to include on charitable receipts
- ☐ Know when to refer a donor to a professional advisor

Knowledge of Legal Context of Gift Planning & the Charitable Sector

- ☐ Legal implications of gift planning from the first conversation to appropriate stewardship
- ☐ Understand terminology, e.g. will clauses, gift agreements, etc.
- ☐ Management of estate gifts and estate administration
- ☐ Know when to seek legal advice and when to encourage donors to do so
- ☐ Familiarity with Canada's charitable sector and the legal framework of charities

Knowledge of Your Charity

- ☐ Familiarity with supporting data systems
- ☐ Understand and implement gift planning and gift receipting policies and procedures with diligence
- ☐ Understand management and governance
- ☐ Familiarity with vision, mission, values and strategic direction

Knowledge of Marketing & Communications

- ☐ Understanding of emerging philanthropic and sector issues and trends
- ☐ Planning and marketing techniques related to fundraising
- ☐ Understanding of the best outreach vehicles for donors
- ☐ Familiarity with donor prospecting approaches
- ☐ Ability to undertake applicable market research



Canadian Association of Gift Planners
www.cagp-acpdp.org

Now that you've completed the checklist, use the Roadmap and decide your next steps on your journey to becoming a more successful charitable gift planner.

OPTIMIZE YOUR WEBSITE FOR PLANNED GIVING

DON'T MISS OUT ON GIFTS BECAUSE
INFORMATION IS NOT AVAILABLE EASILY



Revised 2018

THIRD Edition

PLANNED GIVING for Canadians



*A guide to instituting and managing
a successful planned giving programme*

FRANK MINTON & LORNA SOMERS

Published by CAGP in partnership with Miller Thomson LLP



CAGP



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Paul Nazareth

Vice President, Education & Development



Paul Nazareth

VP, Education & Development. Canadian Association of Gift Planners (CAGP)

Email: pnazareth@cagp-acpdp.org

LinkedIn <https://www.linkedin.com/in/paulnazareth/>

Twitter <https://twitter.com/UinvitedU>

Instagram <https://www.instagram.com/nazarethnetworks/>



RESOURCES



CAGP Resources Mentioned

Free bequest one pager for small charities https://bit.ly/CAGP_FreeOnePageBequest

CAGP textbook for finance and fundraising <http://bit.ly/CanadianGivingTexbook>

To get free updates on planned giving from CAGP <https://bit.ly/GetFreeUpdatesfromCAGP>

To be part of the bequest campaign Will Power <https://www.cagp-acpdp.org/en/will-power>

Professional development roadmap <https://www.cagp-acpdp.org/en/competency-framework-for-charity-based-gift-planners>

Greg Warner major gift CAGP webinar April 2020 https://bit.ly/MarketSmart_MajorandPlannedGifts

Jen Love & Aimee Lindenberger webinar March 2020 <https://bit.ly/LegacyMarketingWebinar>

Resources for Faith Philanthropy

Lori Guenther Reesor – Church Giving Strategy Blog <https://www.lgreesor.com/blog-4>

M&M International (Martha Asselin) Church Giving Blog <https://www.mminternational.ca/about-us/blog/>

Loonie; A book on faith and finances <http://www.ucrdstore.ca/united-church-publishing-house/loonie-crazy-talk-about-faith-and-finances-e-book.html> via United Church Publishing

Henry Nouwen; The spirituality of fundraising <https://www.amazon.ca/Spirituality-Fundraising-Henri-J-Nouwen/dp/0835810445>

Paul Nazareth

VP, Education & Development. Canadian Association of Gift Planners (CAGP)

14 Chamberlain Avenue, Suite 201A Ottawa, ON K1S 1V9 (I'm in our Toronto Office)

Tel: 613.232.7991 ext 226 / Toll-Free 1.888.430.9494 x226 www.cagp-acpdp.org

*I exist to serve the sector and all the organizations and amazing people working in it.
Can I help you in any way? Reach out. Seriously.*

Mobile & Text 416.554.7542

Email: pnazareth@cagp-acpdp.org

LinkedIn <https://www.linkedin.com/in/paulnazareth/>

Twitter <https://twitter.com/UinvitedU>

Instagram <https://www.instagram.com/nazarethnetworks/>

RESOURCES



Experts their resources cited in session

Imagine Canada – From Church to Corporations – Who will teach generosity? <http://bit.ly/TeachingGenerosity>

CAGP blog <https://www.cagp-acpdp.org/en/blog/the-literacy-of-grief-and-death-is-more-important-than-ever>

CharityVillage small charities online planned giving course <https://charityvillage.com/learning-centre/courses/planned-giving/>

Prof. Russell James & Michael Rosen pandemic planned giving https://bit.ly/PlannedGivinginaPandemic_MLRJ

Good Works pandemic planned giving discussion <http://www.goodworksco.ca/rush-hour-on-the-planned-giving-freeway/>

Free recorded webinar by Good Works with Ryan Fraser & Brenda McEachern https://bit.ly/GoodWorks_FreePGwebinar

Good Works blog post on conclusions of web discussion <http://www.goodworksco.ca/planned-giving-in-a-pandemic/>

Greg Warner Marketsmart <https://imarketsmart.com/author/greg-warner/>

PG Growth – Strategic Giving in Uncertain Times – Free webinar recording https://bit.ly/PGgrowth_PandemicPlannedGiving

Give5 Foundation 5% granting movement - <http://give5.ca/>

Vitreo blog, fundraising and futureproofing past Covid19 <https://bit.ly/FutureproofingCovid19>

Vitreo podcast, fundraising in the time of Covid19 <https://www.vitreogroup.ca/podcast/episode-38-fundraising-in-time-of-covid-19>

Harvey McKinnon & Associates <https://www.harveymckinnon.com/>

David Kravichuck, Common Good Fundraising <https://cgfundraising.com/>

Ligia Pena international legacy expert – training <https://globetrottingfundraiser.com/legacy-bootcamp/>

Agents of Good with Bloomerang – Donor Love (and PG design) <https://bloomerang.co/blog/video-the-7-lessons-of-donorlove/>

Global Philanthropic – Major gifts in a pandemic? 15 min video <https://bit.ly/MGinCrisis>

Will your Nonprofit survive Covid19? <https://www.globalphilanthropic.ca/blog/2020/04/will-your-nonprofit-survive-2020/>

Leah Eustace – Blue Canoe – Out of office <http://yourbluecanoe.ca/new/im-out-of-the-office-so-fend-for-yourself/>

Kathy Arney, CPA – KEA Canada <https://www.keacanada.com/kea-notes-1/2020/3/20/adapting-to-support-you-in-these-troubled-times>

Betty Ferreira – ONN Cash Flow in Crisis Webinar for NFP Finance staff https://bit.ly/CashFlowCrisis_ONN

Creating a great donor experience in this crisis – Blakely <https://bit.ly/DonorExperienceBlakeley> free webinar

RESOURCES



Recommended Books

Engagement Fundraising Greg Warner <https://www.amazon.com/Engagement-Fundraising-raise-money-century/dp/1732262810>

Empowerment Dialogue Ken Ramsay <https://hilborn-civilsectorpress.com/products/empowerment-dialogue>

Driven by Purpose Ryan Fraser <https://drivenbypurpose.ca/>

You Can't Take it With You – Fraser Green <https://www.amazon.ca/You-Cant-Take-Science-Fundraising/dp/109119050X>

Winners Take All <https://www.amazon.ca/Winners-Take-All-Charade-Changing/dp/110197267X/>

Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance <https://www.decolonizingwealth.com/>

Trust <https://www.penguinrandomhouse.ca/books/592618/trust-by-david-johnston/9780771047152>

New Power <https://thisisnewpower.com/>

Retain & Gain – FREE Workbook for Recruiting and Retention <http://bit.ly/NonprofitTalentWorkbook>

Podcasts

CharityVillage Small Nonprofit Podcast <http://bit.ly/SmallNonprofitPodcast>

Vitreo Group <https://www.vitreogroup.ca/podcast>

Doesn't Hurt to Ask – Cathy Mann, small non-profit expert <https://cathymann.ca/podcast/>

Adam Aptowitzer, Charity Law Expert : Charity Chat <http://charitychat.ca/>

CPA Ontario podcast http://bit.ly/CPA_Podcast

Future of Good – Edge and Main <https://futureofgood.co/category/podcast/>

Imagine Canada <https://imaginecanada.ca/en/1601>

No Little Plans SDG's and Canadian Nonprofits <https://alliance2030.ca/podcasts/>

Ottawa Radio Show on Charity, an Hour to Give <https://www.1310news.com/an-hour-to-give/>

Beyond the Bakesale <https://beyondthebakesale.ca/>

RESOURCES



Reports and Resources

2020 CanadaHelps new Giving Report <https://www.canadahelps.org/en/the-giving-report/>

Small Charity: Creating a fundraising ecosystem – Cathy Mann <https://www.fundraisinglab.ca/enablingecologyaccess>

Imagine Canada Chief Economist Reports (mentioned, the “Social Deficit”) <http://bit.ly/CharityChiefEconomist>

30 Years of Giving in Canada Report <http://www.imaginecanada.ca/30years>

Gaming replacing Golf <https://nonprofitquarterly.org/video-game-linked-digital-telethons-emerge-as-fundraising-tool/>

Imagine Canada – Corporate Giving Report <https://www.imaginecanada.ca/en/360/changes-corporate-giving-canada>

Expert on the theology of giving and faith fundraising mentioned: Lori Guenther Reesor <https://www.lgreesor.com/>

Regulatory Regime for Social Enterprises in Canada http://bit.ly/SocialEnterpriseCanada_Report

AFP Foundation Research page: <https://afpglobal.org/afp-foundation-philanthropy-canada/research-programs-resources>

AFP Report: Retail Demand for Impact Investing: <http://bit.ly/RetainDemandforImpactInvesting>

AFP Women in Philanthropy Research: <http://bit.ly/AFPWomeninPhilanthropy2020>

AF What Canadian Donors Want 2018 <https://afpglobal.org/afp-foundation-philanthropy-canada-releases-biennial-survey-what-canadian-donors-want>

Sector Trend Alerts & Important Partners

To get free updates on planned giving from CAGP <https://bit.ly/GetFreeUpdatesfromCAGP>

Imagine Canada early alert newsletter <https://imaginecanada.ca/en/early-alert>

Investment Readiness Program via Community Foundations Canada http://bit.ly/IRP_CFC

SDG's in action via Community Foundations Canada <https://www.communityfoundations.ca/topics/sdgs/>

The Circle on Aboriginal Philanthropy <http://www.philanthropyandaboriginalpeoples.ca/>

Do you know sector academics? Meet national cohort of the Carlton Masters in Nonprofit Leadership <http://bit.ly/MPNL2020>