

**GUEST SPEAKER WEBINAR**

## **ANNOUNCING CANADA'S NEW LEGACY GIVING CAMPAIGN**



**Laurie Fox**  
*Director, National Legacy  
Campaign  
Canadian Association of Gift  
Planners*



**Paul Nazareth**  
*Vice-President, Education  
& Development  
Canadian Association of  
Gift Planners*



# Guest Presenter – Laurie Fox



## **Laurie Fox, MBA**

### Director, National Legacy Campaign – CAGP



Laurie has been a die-hard charity sector professional for close to 2 decades. Most recently, Laurie specialized in marketing and fundraising (specializing in gift planning) at Toronto General & Western Hospital Foundation and Plan International Canada. It was there that Laurie discovered the power of strategic giving to turn the ordinary into the extraordinary; and its potential to help meet some of society's greatest needs. For the past two years Laurie has been working with CAGP to develop Canada's first national legacy campaign, an effort to promote gift planning amongst all Canadians.

Laurie's previous experience includes designing and developing new programs at various international development organizations in Kenya, the US, and various other countries around the world.

# Guest Presenter – Paul Nazareth



## **Paul Nazareth**

VP, Education & Development – CAGP

Paul Nazareth is a leader in Canada's philanthropic sector with over 20 years' experience. Currently the Vice President, Education & Development at the Canadian Association of Gift Planners, he was most recently VP at CanadaHelps. Paul has been a philanthropic advisor with a national Wealth Management firm and spent over a decade with charities like the University of Toronto and the Catholic Church of Greater Toronto.

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 University Masters in Nonprofit Leadership program, lead faculty instructor on Advisor Education with Knowledge Bureau as well as tax and advisor communities like Advocis, CPA and Estate Planning Councils. 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.



# Will Power

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Canada's Legacy Giving Campaign

Note: The campaign is currently in development.  
Information presented here is subject to change.

# About CAGP

Uniting charities & advisors to  
“create a better world through  
strategic charitable giving”.

1. Professional development
2. Networking
3. Advocacy
4. Public awareness

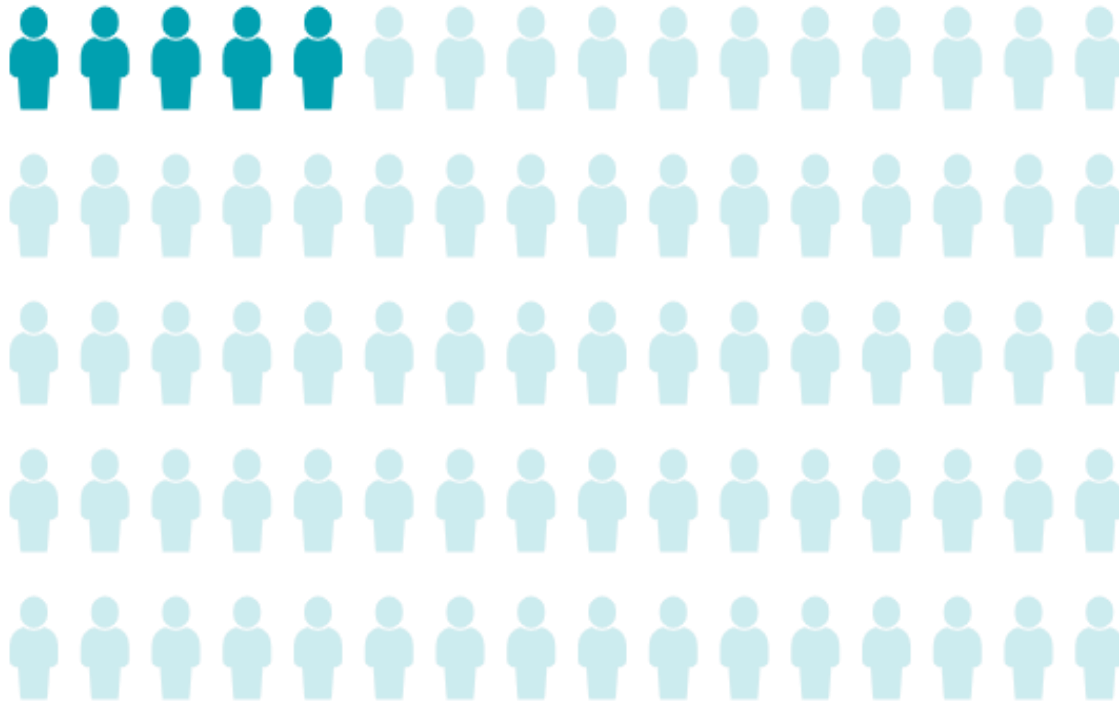


**There's hope on the horizon.**

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# Where Are We Now?

5%



(A number that has not changed much in over 15 years!)

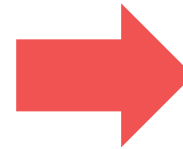
## THE BIGGEST BARRIERS:

- 1) Immediate rejection over the belief that gifts in Wills take away from loved ones
- 2) Inaction due to indecision and inertia



# In 10 Years, Where Do We Want To Be?

8.5%



**\$40B  
To Charities**



Biggest effort in  
Canada's history  
to make leaving  
a gift in a will the  
social norm.



**Support a charity in your Will**



I love my grandson.  
**But I also love cats.**

You can have it both ways. Support a charity in your Will and the ones you love. Find out how at [Willpower.ca](https://Willpower.ca)

 **WILL  
POWER™**



A man with grey hair and a beard, wearing a green t-shirt, and a young woman with brown hair in a bun, wearing a blue t-shirt, are both hugging a large, moss-covered tree trunk in a forest. The man is on the left, and the woman is on the right. The tree trunk is covered in thick green moss. The background shows other trees and foliage in a forest setting.

# I love my daughter. I also love trees.

You can have it both ways. Support a charity in your Will and the ones you love. **Find out how at [WillPower.ca](https://WillPower.ca)**

 **WILL  
POWER**

Image: Getty Images/Adam W. Johnson



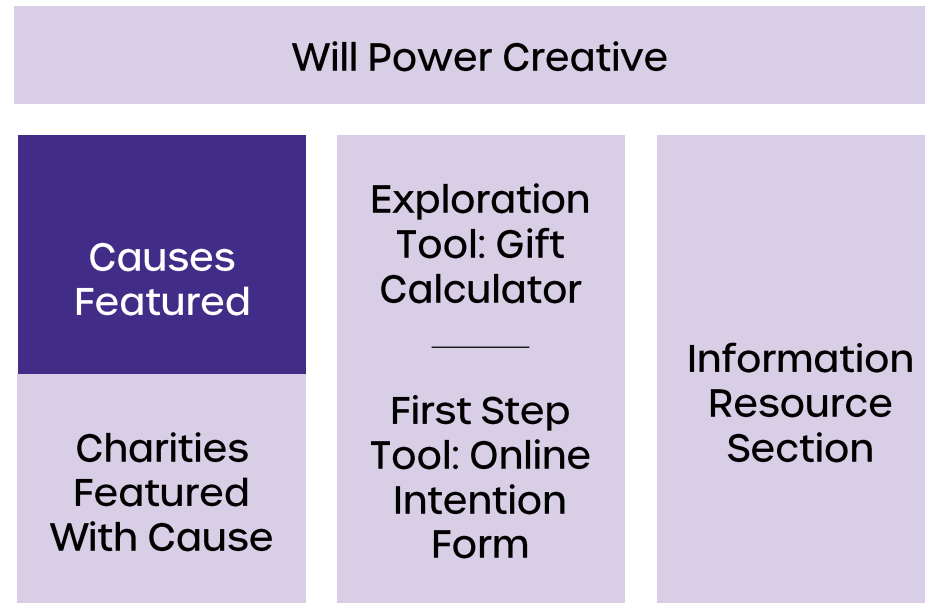
# Campaign Blueprint

## RAISING INTEREST VIA BROAD-BASED MARKETING

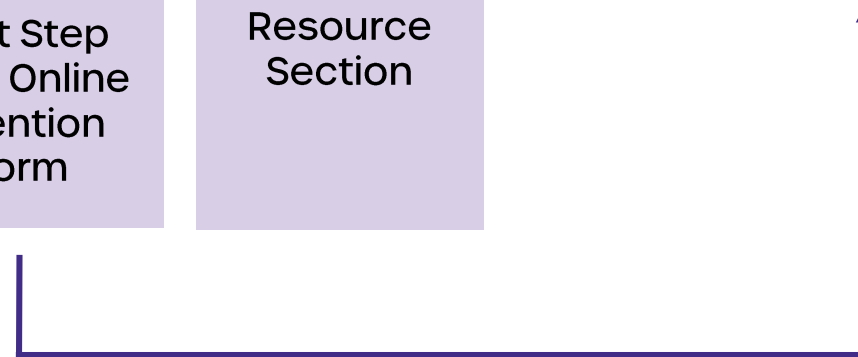
- Social Media Advertising
- Paid Advertising
- Billboard, Radio
- PR



## PROMPTING ACTION ON THE WEBSITE



## DRIVING TO CHARITIES & ADVISORS



**Let's Do This Together.**

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# What You Get

## Broad-based marketing. With results.

You're FRONT AND CENTER  
when people consider  
gifts in will for the first time

- Charities featured up front on website
- Online exploration tool drives new prospects to you
- Charities featured at engagement event

You're TOP OF MIND  
when people take action


- Online intention form acts as a placeholder for a charitable bequest at next Will revision.
- Intention tool helps secure bequests for you.

You move existing  
donors along.

- "It takes 7-10 touches, outside of a charity's communications, for a donor to think about leaving a gift in their Will"  
*Penelope Burke*

# What You Get (Cont.)

Illustration of how a charity may use the marketing toolkit:



The illustration shows a white rectangular card with a thin grey border. In the top corners, there are four red right-angled triangles pointing towards the center. The text 'Your Cause.' is centered in a bold, black, sans-serif font. Below this, the text 'I love my kids.' is followed by 'But I also love Your Cause.' in a larger, bold, black font. Further down, a paragraph reads: 'You can have it both ways. Support Your Cause, and the ones you love. Find out how at [yourcause.ca](http://yourcause.ca)'. At the bottom left is the 'WILL POWER' logo, consisting of two red triangles forming a square and the words 'WILL' and 'POWER' in red. At the bottom right is a black rectangle with the words 'Your Cause' in white.

**Your Cause.**

I love my kids.  
**But I also love Your Cause.**

You can have it both ways. Support Your Cause, and the ones you love. Find out how at [yourcause.ca](http://yourcause.ca)

**WILL POWER**

Your Cause

## Tools to connect with your supporters around the campaign.

Leverage the campaign to speak to your donors.

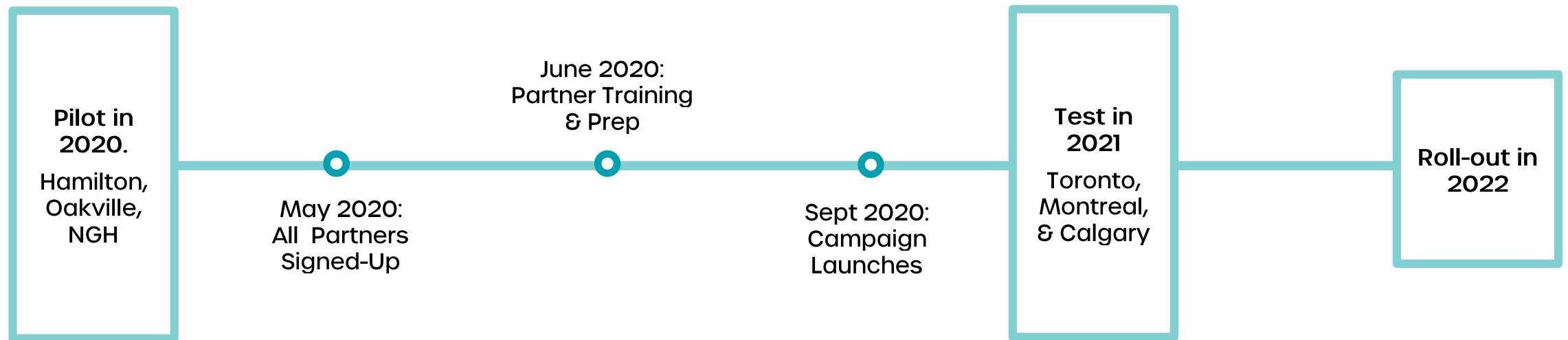
- Marketing toolkit with campaign collateral you tailor to your brand.
- Includes digital pieces, print pieces, and template PR communications

Build your know-how.

- Annual research
- One free CAGP training on gift planning
- One free CAGP membership



# Will Power Launches in September!



# Ready To Try Something New?

Band	Organization Size (Based on 3 Year Average of Received Donations)	Founding Member Annual Partner Fee
A	> \$50M	\$10,285
B	\$20-50M	\$8,883
C	\$10-20M	\$8,581
D	\$8-10M	\$8,033
E	\$6-8M	\$6,758
F	\$4-6M	\$5,079
G	\$2-4M	\$4,208
H	\$1-2M	\$3,396
I	\$250k-1M	\$2,032
J	<\$250k	\$509

It's a difficult time for charities, and we may be able to help by providing flexibility in fees, as determined on a case by case basis.

Some of our 2020 & 2021 Founding Partners:





# It's time we open-up charitable giving in Canada.

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To join Will Power:

Go to **[www.cagp-acpdp.org/en/will-power](http://www.cagp-acpdp.org/en/will-power)**

Or contact Laurie Fox at **[lfox@cagp-acpdp.org](mailto:lfox@cagp-acpdp.org)**



# Addendum: Planned Giving Resources

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## Upcoming CAGP webinars

1. Bequest Administration – May 27, 1pm

Registration is open at [www.cagp-acpdp.org/en/webinar-wednesdays](http://www.cagp-acpdp.org/en/webinar-wednesdays)

2. Planned Giving Is More Important Than Ever In Times of Crisis & Economic Downturn - May 6<sup>th</sup>, 1pm

Registration will open soon at [www.cagp-acpdp.org/en/webinar-wednesdays](http://www.cagp-acpdp.org/en/webinar-wednesdays)

## CAGP Resources

- Textbook on planned giving, <https://bit.ly/PlannedGivingForCanadians>
- Previous CAGP webinar on Planned Giving for Small Shops, <https://youtu.be/yy708sEB5BY>
- Previous podcast on Planned Giving for Small Shops, <https://bit.ly/PlannedGivingForSmallShops>