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
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.
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

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.
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.
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
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
Campaign Blueprint

RAISING INTEREST VIA BROAD-BASED MARKETING

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

PROMPTING ACTION ON THE WEBSITE

Will Power Creative

Causes Featured

Exploration Tool: Gift Calculator
- First Step Tool: Online Intention Form

Information Resource Section

DRIVING TO CHARITIES & ADVISORS
Let’s Do This Together.
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.)

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

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
Will Power Launches in September!

- Pilot in 2020: Hamilton, Oakville, NGH
- May 2020: All Partners Signed-Up
- June 2020: Partner Training & Prep
- Sept 2020: Campaign Launches
- Test in 2021: Toronto, Montreal, & Calgary
- Roll-out in 2022
Ready To Try Something New?

<table>
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<th>Band</th>
<th>Organization Size (Based on 3 Year Average of Received Donations)</th>
<th>Founding Member Annual Partner Fee</th>
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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.
It’s time we open-up charitable giving in Canada.

To join Will Power:

Go to www.cagp-acpdp.org/en/will-power

Or contact Laurie Fox at lfox@cagp-acpdp.org
Addendum: Planned Giving Resources

Upcoming CAGP webinars

1. Bequest Administration – May 27, 1pm
   Registration is open at www.cagp-acpdp.org/en/webinar-wednesdays

2. Planned Giving Is More Important Than Ever In Times of Crisis & Economic Downturn - May 6th, 1pm
   Registration will open soon at 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