



IMPACT REPORT 2024

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Leadership Reflection

As we reflect on the past year and look ahead to the future, we are proud of the progress we continue to make in advancing strategic charitable gift planning across Canada.

At CAGP, we believe in the power of generosity to create a more just and equitable society, and our work remains firmly rooted in our commitment to expanding resources for causes and communities.

In 2024, we delivered impactful education, thought leadership, and research, alongside another outstanding national conference. We strengthened our networks across sectors, fostering collaboration that amplifies our collective impact. As always, we continued to inspire Canadians about the profound opportunity to transform charities and communities through a gift in their Will.

This momentum is only possible because of our members. Our Chapters and their leadership volunteers play a vital role in bringing our mission and bold new vision to life. Our national committees and Board members at both CAGP and the CAGP Foundation provide the governance and guidance that sustain our vitality and future success. We are also deeply grateful to our volunteers, donors, and our dedicated staff team, whose expertise, passion, and hard work drive us forward.

We prepared in 2024 to enter a new strategic planning cycle for

2025–2029, and the result was an exciting new Vision: A more generous and just society, and under the purpose of our updated Mission: To expand resources for causes and communities by educating, advocating, and increasing equitable access to charitable gift planning. Our core strength remains our members and the networks we cultivate—because collective engagement leads to greater impact.

At an ongoing time of political and global uncertainty, when vital DEI efforts are being questioned or even dismantled, CAGP stands firm. We know that diversity strengthens us, and we are motivated and guided by renewed Values of Belonging, Generosity, Equity, Leadership.

We look back with pride, and ahead with optimism, determination, and gratitude for everyone who shares in this mission. Together, we will continue to grow and strengthen the field of charitable gift planning, unlocking even greater generosity for the causes and communities we serve.

With gratitude and humility,

Geoff Graham & Ruth MacKenzie



Geoff Graham
Chair of the Board
of Directors



Ruth MacKenzie
President & CEO

CAGP Board of Directors

Geoff Graham, CFRE
Chair

Serena Hak
Vice-chair

Danzel Pinto
Treasurer

Kathy Arney
Secretary

Maya Ahmad

Michael Blatchford

Christine Kang

Claude Lestage

Jen Pederson

Véronique Salibur

We are also grateful to Heather Powers who completed her time on the CAGP Board in 2024.

Land Acknowledgement

Our staff, operations, work, and network depend on traditional Indigenous territories to provide us physical space, sustenance, safety, and community to work, live, and play.

Our physical office is located in Ottawa, on the unceded, unsurrendered Territory of the Anishinaabe Algonquin Nation whose presence here reaches back to time immemorial. We recognize the Algonquins as the customary keepers and defenders of the Ottawa River Watershed and its tributaries. We acknowledge that our ability to live and work on these lands today is a direct benefit of policies of expulsion and assimilation of Indigenous peoples during the time of settlement and Confederation, and since. The harms of these policies are many and are still being felt in Indigenous communities today. We express gratitude towards the Indigenous peoples who have and will continue to steward these lands. We commit to amplifying the voices of Indigenous peoples and working against the everyday forces of white supremacy and colonialism present in the nonprofit sector.



2024 Highlights

Education

In the past year CAGP had the pleasure of offering two online courses in Gift Planning Fundamentals, one for charities, and one for professional advisors, alongside two engaging in-person sessions, including one conducted in French. We are thrilled to report that the Original Canadian Gift Planning course, held in the picturesque setting of Banff, was a tremendous success once again. Additionally, our Bequest Administration Essentials course, offered online for the third time, sold out quickly and even generated a waiting list—an indication of the strong interest in our programming.

Our Webinar Wednesdays series continued to thrive, providing valuable insights in both English and French. Furthermore, we proudly delivered nine “in-house” gift planning training sessions and speaking engagements tailored for charities and professional advisor organizations.

1733 Total engagements with CAGP education in 2024

Conference

The 2024 CAGP National Conference on Strategic Philanthropy was held in Ottawa, Ontario, where 430 delegates gathered from across Canada. The theme was “Convergence of Generosity”. In addition to an exceptional array of educational opportunities, delegates also experienced an early morning fire alarm, which led to an unexpected outing in the snow and comparison of pajamas!

The topics discussed at the conference have reinforced CAGP’s commitment to diversity, equity, and inclusion in our initiatives, as reflected in our new strategic plan. We were also proud to introduce a quiet space for attendees to unwind, pray, meditate, or and we warmly welcomed everyone to Ottawa with a refreshing non-alcoholic mocktail.

We were also pleased to welcome a new ‘Friend of CAGP’ and to induct a recipient of the Lifetime Achievement Award



Friend of CAGP 2024

Robert (Bobby) Kleinman



Lifetime Achievement Award

Ken Ramsay

Membership

CAGP continued to see a positive uptake in membership throughout the year. We had 1,474 active members as of December 31, 2024 and over 300 new members joined the organization throughout the year. We also had an incredible response to our biennial Member Survey which will help to inform many initiatives in the coming years.

1474

Active members as of December 31, 2024

322

New members joined

36

“New fundraiser” members

60

Organizations have group memberships

359

Members are Will Power partners, both charities and advisors

2024 Highlights

Government Relations

The expertise, analysis, and network of professionals on the CAGP Government Relations Committee continue to provide immense value to CAGP members. Their work ensures that tax policies incentivizing charitable giving—especially complex strategic giving approaches—are continuously monitored, advocated for, and refined where necessary to enhance their efficiency and accessibility.

In 2024, the CAGP Government Relations Committee remained focused on federal legislative changes related to the Alternative Minimum Tax (AMT). Initially introduced as part of a broader federal government effort toward fairer taxation, the 2023 amendments raised concerns within the charitable sector, as they posed a risk to significant charitable gifts.

Thanks to the advocacy efforts of CAGP and others in the sector, these changes were put on hold and ultimately resulted in a partial victory. The donation tax credit for AMT purposes was increased from 50% to 80%, reducing its impact on charitable contributions. Furthermore, proposed adjustments to capital gains inclusion rates in the 2024 budget have alleviated previous concerns about large capital gifts triggering AMT liabilities. As a result, most gifts will no longer be affected. All related legislative changes were approved by December 31, 2024.

CAGP also participated in the annual Charities Day on the Hill, hosted by Imagine Canada. This event provided an excellent opportunity to engage with elected officials, government representatives, and peer charitable organizations involved in public policy and advocacy.



Will Power

Since the inception of the campaign five years ago, an impressive **4.7 million more Canadians** have expressed interest in leaving a gift in their Will. Notably, 2.8 million individuals are now considering this option after being inspired by our Will Power advertisements.

We are thrilled to share that Canada now ranks among the **top three countries in the world** in terms of the percentage of individuals leaving charitable gifts in their Wills, following the UK and Australia. Our campaign has seen remarkable participation, with twice as many charities and advisors involved compared to any other country, demonstrating the strength of the gift planning community in Canada. Over the past year, we have witnessed a 2.5x increase in actions taken on our charity and partner pages. We have also successfully connected over 380 donors who are contemplating a gift in their Will with the charities they are considering.

Looking ahead to 2025, we are eager to launch a new advertising campaign aimed at engaging the next generation of legacy donors. Stay tuned for updates on this initiative and the unveiling of our new Will Power website!

Chapters

VANCOUVER ISLAND

Alli Cheng
Jineane Eason
Brian Irving
Emma Kirkland
Cheryl Onciul
Patrick Smith

GREATER VANCOUVER AREA

Kate Bake-Paterson – Co-chair
Kerry Shillito – Co-chair
Carla Banfield
Robert Hamanishi
Nicole Jeschelnik
Erika Kinast
Tracey Lundell
Tiffany Lusher
Chantelle Ohrling
Shahriar Pedram
Katherine Smart
Vincianne Tricand
Rich Widdifield
Louis Yu

BC INTERIOR

Colleen Cowman – Chair
Sasha Carter
Suzan Goguen

ALBERTA NORTH

Christy Soholt – Co-chair
Laura Svajlenko – Co-chair
Ian Currie
Lisa Dayanandan
April Grindheim
Matt Mandrusiak
Barb Noble
Tracy Zuk

ALBERTA SOUTH

Joel Bray – Co-chair
Kaleigh Goehringer – Co-chair
Whitney Bawel
Jeff Evans
Sheelagh Mercier
Dawn Miller
Whitney Rosborough
Christina Stein

SASKATCHEWAN NORTH

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Connie Andersen
Jordan Arndt
Candace Boersma
Raissa Bugyi
Steven Guenther
Jen Pederson
Stacey Schewaga

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Maureen Harrison
Amy Mohr
Trina Owens
Crystal Schmalte

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Kathryne Cardwell
Florence Carey
Janice Feuer
Matthew Gardner
Elena Grinshteyn
Fayaz Hasan
Jackie Markstrom
Patrick O'Connor
Beth Proven
Monica Sigurdson
Blair Smith
Susan Yakabowich

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Mike Flanagan
Lisa Kolody
Camille Armour Ross

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Gord Baptist
Sheila Daniel
Kim Malcolm
Sarah Morkin

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Lana Dadson
Landon Jennings
Lynn Whetham

NIAGARA GOLDEN HORSESHOE

Amanda Braet
Joan Cosby
Carrie Gemmell
Kristina Manzi
Peter McKinley
Jenn Walsom

GREATER TORONTO AREA

Tammy Garcia – Co-chair
Richard Lefebvre – Co-chair
Marisa Barlas
Samantha Barr
Julie Brown
Janice Correa
Clara Eta
Abdesh Furmah
Ann Gorwill
Serena Hak
Karen Hudson
Gwen Noble
Eric Patterson
Jayne Whitfield
Sarah Zachariah

Chapters

OTTAWA

Megan Doyle Ray – Chair
Paul Brousseau
Rachel Degreef
Leah Eustace
Nadine Fowler
Betty-Anne Howard
Ines Huang
Tina Labelle
Katie Loftus
Erin Meisner
Mitch Miller

QUÉBEC

Nancy Lepage – Chair
Gina Di Filippo
Samar El Soufi
Mélanie Fontaine
Lucille Grimard
Marie-Noëlle Guay
Jeremy Hampson
Catherine Huard
Natalia Kistruga
Mariska Labarre
Sylvain Ladouceur
Claude Lestage
Kim Laporte Phaneuf
Julie Roy
Catherine St-André
Laurence Tremblay

ATLANTIC CANADA

Glenn Stewardson – Chair
Katharine Berrington
Toni Croft
Liz Finney
Jordan Fisher
Geoff Graham
Kathryn Levandier
Terri Mann
Kayleigh Perkins
Emily Smith
Celina Stoyles
Karen Theriault

Committees

GOVERNMENT RELATIONS COMMITTEE

Nicole D'Aoust – Chair
Michael Blatchford
Malcolm Burrows
Terrance Carter
Nicola Elkins
Mark Goldbloom
Geoff Graham
Elena Hoffstein
Robert Kleinman
Kate Lazier
Brenda Lee-Kennedy
Janice Loomer-Margoilis
Ruth MacKenzie
Susan Manwaring
Brenda McEachern
Elizabeth Moxham
Grant Monck
Jill Nelson
Michelle Osborne
Jen Pederson
Heather Powers
Amanda Stacey
Silvia Ugolini
Ross Young

NATIONAL EDUCATION COMMITTEE

Florence Carey – Chair
Kathy Arney
Claude Drouin
Ryan Fraser
Geoff Graham
Erin Kuhns
Claude Lestage
Ruth MacKenzie
DeWayne Osborn
Michelle Osborne
Sharon Redsky
Kerry Shillito

NATIONAL MEMBERSHIP COMMITTEE

Jen Pederson – Chair
Igor Fernandes
Carmela Guerriero
Christine Kang
Lara Kinnear
Henrietta Lam
Clare Levy
Terri Mann
Sarah Morkin
Paul Nazareth
Laura Svajlenko

Funders & Sponsors

Abundance Canada
Aqueduct Foundation
Advocis
Athena Wealth & Legacy Solutions
BC Children's Hospital Foundation
Blackbaud
BMO Private Wealth Management
BMR Group
Benefaction Foundation
CAGP Foundation
CAGP Ottawa Chapter
CanadaHelps
Canada Life
Canadian Donor's Guide
Cardinal Capital Management Inc.
Carters Professional Corporation
CFRE
Chavender
CHEO Foundation
CIBC Private Wealth Management
CI Assante
DLA Piper
The Donor Motivation Program®
DonorPerfect

Ecological Gifts Program,
Environment & Climate
Change Canada
Environics Analytics
Epilogue
The Foundation WCPD
Giftabulator
Global Philanthropic Canada
GoodWorks
KPMG Family Office
Mann Lawyers
McMillan Vantage
Miller Thomson LLP
Mission Fundraising
Myriad Canada
Norton Rose Fulbright Canada
PGgrowth
PearTree Financial Services Ltd.
PhilanthPro Solutions Inc.
Private Giving Foundation –
available through TD
RBC Wealth Management
Royal Trust
Raymond James Canada Foundation
Retirement By Design
Willfora

Gratitude Report

Report from the CAGP Foundation

Building Legacies, Inspiring Generosity

This past year has been a testament to the power of commitment. From long-time supporters deepening their contributions, to heartfelt tributes that honour those who inspire us, we have seen firsthand how generosity fuels growth. With a remarkable donor retention rate and a growing legacy donor community, we're building something sustainable—a better world through strategic charitable giving.

Our mission

To financially support the development and promotion of excellence in strategic, charitable gift planning in Canada.

Commitment

As gift planners our focus is always on sustainability. Multi-year pledges allow us to project and plan our growth and progress and we are deeply appreciative of all our donors who give in this thoughtful way. This year we were honoured that two of CAGP Foundation's earliest visionary supporters, Benefaction Foundation and Keith and Tanja Thomson embarked with us on another journey. Not only did they commit to new three-year pledges, but they doubled the amounts of their gifts!

Inspiration

Many of our donors give to us in appreciation of a friend, colleague or mentor. This year we were the recipient of many heartfelt gifts in honour of past Board Chair Jill Nelson to mark her retirement from the Princess Margaret Cancer Foundation. This wonderful tribute supported an educational bursary.

Excellence

Our donor retention rate continues to rise—it's currently at 72%. And 37% of our donors give monthly or through multi-year commitments. We enjoy 100% support from members of both the CAGP and the Foundation Boards.

Our raison d'être

Our list of legacy donors continues to grow. 14 visionary individuals have let us know of their ultimate gift, one that stands at the core of what we believe in. The types of gift they've chosen to make are reflective of who we are as gift planners. We are honoured to have been made beneficiaries of gifts in wills, life insurance policies, RRSPs and donor-advised funds.

Our results

We raised **\$625,655** in gifts and pledges in 2024. Our actual revenue was **\$445,518**. Our endowment at The Winnipeg Foundation now stands at **\$40,450**.



CAGP Foundation Board

Michelle Osborne – Chair

Barbara Chambers – Vice-chair

Ninette Bishay – Treasurer

Amanda Stacey – Secretary

Jill Nelson – Past Chair

Liz Finney

Grant Monck

Jaya Mootoo

Brad Offman

Ricky Piedrahita

We are grateful to Beth Proven and Marcella Zanella, who completed their time on the CAGP Foundation Board in 2024.

Additional CAGP Foundation volunteers

Nicola Elkins

Roger Lee

Donors & Supporters

A huge thank you to our supporters – you're creating legacies in so many ways, to so many causes!

LEGACY DONORS

James Dunne
Berna Gülmisâl
Serena Hak
Michelle Johnson
Ruth MacKenzie
Chelsea McIntyre
Paul C.S.C. Nazareth
Jill Nelson
Charles O'Neil
Beth Proven
Doug Puffer
Keith Thomson
Gillian Whyte
Neil Williams

MULTI-YEAR PLEDGES

Benefaction Foundation
Blackwood Family Enterprise
Services
Florence Carey
Carters Law Firm
The Donor Motivation Program
Donald K. Johnson
Jackie Markstrom
Margaret Mason KC
Grant Monck
Charles O'Neil
Power Corporation of Canada
Darren & Monika Pries-Klassen
Saskatoon Community
Foundation
Victoria Foundation

MONTHLY DONORS

Maya Ahmad
Kathy Arney
Deborah Bauder
Jennifer Benedict
Yolanda Benoit
Ninette Bishay
Michael Blatchford
Joel Bray
Beth Cairns
Kim Cavener
Barbara Chambers
Jennifer Chegus
Eli Clarke
Colleen Cowman
Megan Doyle Ray
James Dunne
Nicola Elkins
Emelita Ervin
Leah Eustace
Janice Feuer
Liz Finney
Nadine Fowler
Carrie Gemmell
Geoff C. Graham & James B. Tee
Betty-Anne Howard
Erin Kuhns
Tina Labelle
Clare Levy
Greg Lichti & Garth Norbraten
Katie Loftus
David Love
Ruth MacKenzie
Susan Manwaring

Paul & Chastity Nazareth
Jill Nelson
Brad Offman
Michelle M.B. Osborne
Jen Pederson
Ligia Peña
Ricky Piedrahita
Justin Pilon
Heather Powers
Maurice Prevost
Beth Proven
Doug Puffer
Véronique Salibur
Amanda Stacey
Anne Thibodeau
Andrew Valentine
Jennifer Walsom
Ross B. & Alison Young
Marcella Zanella

ANNUAL DONORS

Priscilla Balan
Nicole Bedard
Peter Bennett
Malcolm Berry
John Blachford
Kimberley Blease
Joan Blight
Heather Borrelli
Stephanie Bray
Yolanda Bronstein
Christine Brown
Malcolm Burrows
Theresa Butler-Porter
Jennifer Button

Laura Byl
CAGP London Chapter
CAGP Manitoba Chapter
Doris Cameron
CanadaHelps
CIBC Private Wealth
Daniel Clapin
CN Railroaders in the Community
Tracey Comeau
Jessica Cranmer
Barb Crisp
Keith Curtis
Claude Drouin
Mia Dunn
Samar El Soufi
Andres Escobar
Leila Fiouzi
Daniel Frajman
André Franche
Ian Fraser
Sherri Freedman
Georgiana Gamboa
Christie Geen-Difede
Daniela Gheoculet
John Gormaly
Sherri Grosz
Carmela Guerriero
Serena Hak
Aidan Halley
Vicki Hayter
Nicole Herdman
Elena Hoffstein
Christine Kang
Peggy Killeen
Lara Kinnear
Robert A. Kleinman &
Alice Herscovitch
Sarah Kreplin
Catherine Labate
Henrietta Lam
Caralen Law
Kate Lazier
Elizabeth LeClair

Richard Lefebvre
Claude Lestage
Prestina Li
Kirstin Ling
Conny Lo
Frank Lockington
Janice Loomer Margolis
Diem Luong
Tiffany Lusher
Danièle Mackinnon
Meredith Meads
Karen Ming-Sun
Gordon Moir
Marilyn Monson
Jaya Mootoo
Christi Musico
Sara Neely
Meredith Nelson
Susmita Neville
Gwen Noble
Jaymie Oakes
Ramona Oss
Genane Peniak
James Perkins
Danzel Pinto
Lydia Potocnik
The Princess Margaret
Cancer Foundation
Private Giving Foundation
Janine Purves
RBC Wealth
Management Canada
Christopher &
Alison Richardson
Thomas G. Riglar
Danielle Robinson
Ann Rosenfield
Karen Sanchez
Lesia Skyba
Karen Sparks
Lauren Stamhuis
Shannon Stuart
Danielle Sutton

Jasmine Sweatman
Mehvish Syed
Syd Taylor
Charlene Taylor
Tina Tehranchian
Toronto Foundation
Connie Tsui
Hannah Tsui
Meg Tubman
Ashley Vekeman
Julie Wade
Stephen Webb
Jennifer Whitby
Jayne Whitfield
Jessica Wroblewski
Susan Yakabowich
and three anonymous donors

"It's hard to put into words how grateful I am to CAGP and its incredible community. February will be my seventh year leading Legacy Giving here at the University of Guelph. When I first started I was learning on the job and it was thanks to the amazing community I discovered through CAGP that I've been able to grow the program and learn so much. It's a privilege to now give back to CAGP by volunteering with the GTA chapter, participate in their mentorship program to share my knowledge, and to make this donation."

- Jayne Whitfield

Financials

For the year ended December 31, 2024

| | National Office | Chapters | CAGP Foundation | Total 2024 | Total 2023 |
|--|-----------------|-----------|-----------------|--------------|--------------|
| REVENUE | | | | | |
| Will Power campaign memberships and sponsorships | \$ - | \$ - | \$ 1,022,471 | \$ 1,022,471 | \$ 1,268,132 |
| Conference | 636,485 | - | - | 636,485 | 553,523 |
| Membership fees | 409,688 | - | - | 409,688 | 373,156 |
| Donations | - | - | 352,450 | 352,450 | 322,532 |
| Education courses and designation program | 34,797 | - | 294,285 | 329,082 | 342,434 |
| Interest and other | 36,081 | 12,774 | 32,177 | 81,032 | 78,407 |
| Leave a Legacy and other sponsorships | - | 44,747 | - | 44,747 | 6,412 |
| Job postings | 30,350 | - | - | 30,350 | 36,250 |
| Chapter events | - | 26,696 | - | 26,696 | 47,806 |
| | 1,147,401 | 84,217 | 1,701,383 | 2,933,001 | 3,028,652 |
| EXPENSES | | | | | |
| Will Power campaign | - | - | 1,051,515 | 1,051,515 | 903,750 |
| Personnel | 478,252 | - | 240,339 | 718,591 | 727,403 |
| Conference | 496,207 | - | - | 496,207 | 501,639 |
| Professional fees | 197,004 | - | 10,774 | 207,778 | 186,045 |
| Administration | 54,744 | 41,461 | 32,001 | 128,206 | 136,573 |
| Website impairment loss | 57,397 | - | 60,585 | 117,982 | - |
| Meals, travel and accommodation | 17,360 | - | 67,667 | 85,027 | 99,268 |
| Fundraising | - | - | 74,390 | 74,390 | 69,366 |
| Chapter events | - | 41,041 | - | 41,041 | 34,727 |
| Memberships and honorariums | 7,858 | - | 20,205 | 28,063 | 27,521 |
| Rent | 10,798 | - | 7,199 | 17,997 | 17,450 |
| Leave a Legacy | - | 4,614 | - | 4,614 | - |
| | 1,319,620 | 87,116 | 1,564,675 | 2,971,411 | 2,703,742 |
| NET REVENUE (EXPENSES) BEFORE INTER-FUND REVENUE AND EXPENSES | (172,219) | (2,899) | 136,708 | (38,410) | 324,910 |
| Chapter grants | (44,259) | 44,259 | - | - | - |
| Conference bursaries | 23,965 | (23,965) | - | - | - |
| Management fee | 143,593 | - | (143,593) | - | - |
| Management fee - Will Power campaign | 11,958 | - | (11,958) | - | - |
| Sponsorship | 10,500 | - | (10,500) | - | - |
| NET REVENUE (EXPENSES) FOR THE YEAR | \$ (26,462) | \$ 17,395 | \$ (29,343) | \$ (38,410) | \$ 324,910 |

ABOUT US

**JOIN US IN MAKING THE WORLD A BETTER PLACE
THROUGH STRATEGIC CHARITABLE GIVING!**

Igor Fernandes
Digital Communications
Specialist

Laurie Fox
Campaign Director,
Will Power

Nancy Ho
Campaign Manager,
Will Power

Peggy Killeen
Development Director,
CAGP Foundation

Lara Kinnear
Manager, Membership

Erin Kuhns
Manager, Education
& Training

Caralen Law
Conference &
Event Planner

Clare Levy
Director, Strategic
Communications &
Network Engagement

Ruth MacKenzie
President & CEO, CAGP
/ Executive Director,
CAGP Foundation

Jaymie Oakes
Administrative Assistant,
Finance & Donor Relations

Tara Sandler
Vice President, Education
& Partnerships

Vikrant Singh
Digital Marketing
Manager,
Will Power

Dana Thomson
Executive Assistant



Canadian Association
of Gift Planners

14 Chamberlain Avenue, Suite 201A
Ottawa, Ontario K1S 1V9

1.888.430.9494
info@cagp-acpdp.org