CAGP

Professional Development Roadmap

Supporting the competencies of professional advisors working in philanthropy

Become a CAGP Member

Membership in CAGP offers a variety of benefits that support the development of your business!

These outstanding products and services are part of your CAGP member benefit package

RESOURCES

- Charitable Donations of Life Insurance - CAGP Guidelines
- Doing Good for Business
- The Philanthropic Conversation: A guide for professional advisors
- Planned Giving for Canadians
- Report: Current Trends & Opportunities in Legacy Giving

MEMBER BENEFITS

- Ask An Advisor
- Special pricing on MFA-P professional designation program
- Enrollment in national legacy campaign "Will Power" included with CAGP membership
- Member pricing on Strategic Insight's Donor-advised Fund report
- National network of CAGP members: charity fundraisers and professional advisors, all leaders and experts in their field

	1-3 years advising on philanthropic matters	3-5 years advising on philanthropic matters	5 years or more advising on philanthropic matters

ACTIONS

1-3 years:
- Participate in Will Power campaign as a representative advisor →
- Participate in Local Chapter Educational Events # →
- Participate in national education programming / national conference # →
- Volunteer on Local Chapter Executive Committee →

3-5 years:
- Present at Local Chapter →
- Represent CAGP Chapter in local advisor networks, i.e., EPC, Advocis, Chamber/BIA →
- Present for national education program →
- Present at CAGP national conference →
- Volunteer on national committee (conference, education, membership) →

5 years or more:
- Present on gift planning at national advisor gatherings : STEP, CALU, Advocis →

COURSES

1-3 years:
- Gift Planning Fundamentals for Professional Advisors # →
- MFA-P through Knowledge Bureau →

3-5 years:
- Original Canadian Gift Planning Course # →

5 years or more:
- Advanced Canadian Gift Planning Summit # →

 # Qualifies for MFA-P recertification credits

Getting the most out of CAGP training and professional development.

CAGP's training courses are designed to address the skills and attributes outlined in the Competency Framework for Professional Advisors.

Professional Advisor Competency Framework

The framework outlines the necessary skills and knowledge a professional advisor needs in order to facilitate gift planning with clients and reflects the two pillars of competencies within the gift planning profession: enabling competencies and technical competencies.

ENABLING COMPETENCIES

Relationship Building with the client. The ability to:

- ☐ Develop long-term, trust-based relationships with clients that support all the client's needs including opportunities for philanthropy, the desire for a legacy or for positive impact in the world;
- ☐ Actively listen and retain what is being said;
- ☐ Be comfortable exploring and understanding clients' values, what is important to them and how they may wish to have an impact in the world;
- ☐ Explore with clients if and how they might want to involve others in their family with their philanthropy;
- ☐ Demonstrate empathy, understanding and comfort around end of life discussions related to philanthropy;
- ☐ Translate sometimes complex technical, legal and tax-related language and concepts, where necessary, into plain English to aid in the client's comprehension of philanthropic concepts.

Relationship Building with stakeholders. The ability to:

- ☐ Build collaborative and mutually beneficial networks of trusted legal, tax, financial and insurance advisors as well as charity personnel in order to best meet the needs of clients;
- ☐ Work effectively with family members and/or the client's other advisors and relevant charity personnel;
- ☐ Share philanthropic principles and opportunities with others in the community.

Ethics and Judgement:

- ☐ Adherence to the CAGP Code of Ethics and other codes of ethics relevant to the professional advisor's credentials;
- ☐ Ability to identify where a client's needs (due to competence, financial viability, family commitments, and other factors) align or differ from a plan or product that the advisor may personally favour;
- ☐ Ability to identify and retain confidential information that may not be appropriate to share with others;
- ☐ Knowing when to re-direct a client to more appropriate gift planning vehicles or charities, whether or not such is in the best interest of the person undertaking gift planning discussions;
- ☐ Ability to identify and avoid conflict of interest scenarios;
- ☐ Understanding of the concept of "no gift before its time" (in the best interests of the client);
- ☐ Appreciation of how to appropriately approach and work with charities to assist them to understand the services which you may provide to them in order to enhance their offerings to donors.

TECHNICAL COMPETENCIES

Knowledge of Gift Planning Vehicles. An understanding of:

- ☐ A variety of gift vehicles such as bequests, securities, registered funds, insurance, annuities, gifts in kind for both current and deferred giving and how each may be applied to provide specific benefits to clients, their families and those charities that are meaningful to them;
- ☐ The opportunity and impact various options have for the client (including degree of control, access to capital, timing and tax treatment considerations);
- ☐ Advantages of corporate vs. personal giving;
- ☐ How to "plan for impact" in order to assist clients to make effective donations;
- ☐ When to refer the client to other specific professional advisors to assist.

Knowledge of How Charities Operate. An understanding of:

- ☐ The philanthropic and charitable sector landscape, emergent trends that are impacting it and how they are influencing your clients' giving decisions;
- ☐ How charities operate and charities' governance principles;
- ☐ How planned gifts (deferred and current) and major gifts are traditionally cultivated, solicited and stewarded by charities;
- ☐ How to work with charities to communicate and address the interests of clients.