

# PERSPECTIVE

## The Vitality of an Analog Guide in a Digital Age – Unlocking Generosity in Estate Planning

In my role with the Canadian Association of Gift Planners (CAGP) I have travelled the back roads of Canada from Newfoundland to Vancouver Island and visited dozens of Estate Planning Councils and the offices of thousands of estate planning lawyers. Few things comfort me more as a 21-year charitable gift planner than seeing the Canadian Donor's Guide on the table where lawyers keep their estate planning discussion material; not on the dusty shelf with the legal reference guides.

As our community launches the new “Will Power” program (WillPower.ca) to engage the public across Canada in a campaign to normalize the idea of charitable bequests, information still needs to live on the coffee tables of estate lawyers. And for deep thinking donors who like to do their homework and research charities, I am so grateful for donorsguide.ca where the digital edition, over and above the old Canada Revenue Agency charities search site, has the actual contact information of human beings at charities that donors can talk to. As a believer in the importance of the digital age, it pains me how hard it is to find human gift planners on the websites of charities still.

I'll admit, as someone who has used the Guide to help donors as a fundraiser and clients as an advisor, one of my favourite sounds to hear from donors when they look through the Guide is “Huh!”

That's the sound of someone realizing

one of two things:

*#1: I didn't know my favourite charity did that!* Truly the Donors Guide has been a great help to the gift planning community in clarifying not just the legal title of a charity but more of what they do and how they do it. Contributing to the more healthy culture of trust and ultimately more undesignated gifts so an organization can meet the needs of the day when the gift comes in, not just when it is written. Often years go by between these two dates and programs, problems and solutions change.

*#2: I didn't know there were more organizations connected to a cause I care about or problem I am looking to address!* CAGP is proud to stand alongside estate planners who have deeper discussions about philanthropy with their clients. From food security, social inequality, gender justice, community access – there are so many organizations donors know well, but even more they discover through the Donor's Guide that can help them make a bigger difference than they thought possible in their Will. As the advisors who serve these many generous clients and families will share, they are the masters of the how to make a bequest, when to make the plan and what assets to give...but the why of giving and the choice between the many charities that represent solutions, is something no one can truly anticipate. The Guide is a gift in this regard.

Most importantly, the charity and advisor community is grateful for the



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decades long collaboration of the Donor's Guide team and their commitment to reaching ALL of Canada. The Guide goes out to thousands of advisors in every corner of the country and creates a point of both equity and access to empower the philanthropic conversation and support the decisions of all donors at different ages and stages. Whether it be those who prefer the hard copy or the online edition, the Guide continues to represent the best of Canadian charity to all Canadians coast to coast to coast.

So, to you dear reader, whoever you are holding this Guide; If you're a generous supporter, you'll find a source of inspiration. If you're an advisor, you'll find critical information. And if you're a charity you'll find a way to connect with both donors and advisors who can find you and engage your organization and support your mission to fulfill their vision for a better Canada and a better world.

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management firm in a trust company and spent 15 years working with charities from Universities to Churches. He is on the board of several charities including The Circle Canada and on the

Advisory Council of Carleton University's Masters in Philanthropy and Nonprofit Leadership program. He serves as faculty for the Master Financial Advisor in Philanthropy (MFA-P) program led by

CAGP, Knowledge Bureau and Spire Philanthropy, and is a frequent instructor for the tax and advisor community through organizations like CPA, Advocis, STEP and Estate Planning Councils.