**Chapter Bursary Application Questions**

1. Have you been a CAGP member-in-good-standing for at least 3 months prior to the application deadline of January 20, 2025? (The Chapter-sponsored bursaries are available to CAGP members-in-good-standing for at least 3 months prior to the bursary application deadline.)

2. Have you received a CAGP Chapter-sponsored bursary in the last 2 years? (Priority will be given to applicants who have not received a bursary in the last 2 years but you may still apply if you have.)

3. First Name

4. Last Name

5. Professional Title

6. Organization/Company

7. City

8. Province

9. Telephone

10. Email

11. What local CAGP Chapter are you affiliated with?

12. What are your objectives in attending the Conference? (Up to 100 words)

13. How many years of experience do you have in Strategic Charitable Gift Planning?  Such planning includes advisors utilizing charitable gifts in their client's financial or estate plans.

14. How would you describe your level of Gift Planning knowledge and experience?
    - Beginner (can illustrate individual cash donations)
    - Intermediate (can illustrate above + listed securities)

- Advanced (can illustrate above + insurance)
- Expert (can illustrate above + personal corporate and/or trust gifts)

15. What percentage of time is spent on gift planning? (e.g. program design, implementation, P&P, gift solicitation, stewardship, donor/client follow up, etc.) Please give your best estimate and not a range.

16. Please list any workshops, courses, webinars, and/or conferences that you attended over the past five years that included gift planning:

17. How many Chapter events (in person or remote) have you attended in the last 12 months?

18. What is your professional development budget per year? Please write the number and not a range.

19. How many meetings/interactions, including phone/text/email etc., with financial advisors have you had in the last 12 months? (For fundraising staff; N/A for advisors.)
Options: 0 / <3 / <5 / <10 / 10+ / N/A

20. Additional Comments