

Plenary Speakers



Monique Manatch

Monique Manatch is a member of the Algonquins of Barriere Lake and a Knowledge Keeper. Currently, Monique is a student at Carleton University taking a doctorate program in Anthropology focusing on the impact, use and creation of digital arts in the Indigenous community. Her Master's Degree is in Indigenous and Canadian Studies with a specialty in Digital Humanities. Monique also holds a post-graduate diploma in Indigenous Policy and Administration.

In 2004, Monique became founder and Executive Director of Indigenous Culture and Media Innovations (www.icmi.ca). ICMI is dedicated to the skills development of Indigenous communities through the production media and arts. Monique has facilitated Indigenous artists and community members throughout Ontario, Quebec and Newfoundland. Currently, Monique is working on projects which outreach to the Indigenous community to discuss artistic needs and begin developing a national network.

Over the past 20 years Monique has produced several video documentaries about Indigenous issues. Monique also facilitated the production of videos and community radio programming with Kitigan Zibi Anishnabeg, Mitchikanibikok Inik (Algonquins of Barriere Lake), Muskegowuk Cree and the Indigenous community in Ottawa.



Chantel Chapman

Chantel Chapman is a refreshing voice in the financial recovery and education space; renowned for her cutting-edge, relatable, and trauma-informed money guidance. In 2018, Chantel founded The Trauma of Money™, an accredited course certifying professionals in facilitating and healing money trauma. Leveraging 14+ years in mortgage and financial literacy/recovery consulting, Chantel has taught and written finance curricula for numerous Universities and non-profit organizations like United Way. She's also a proud member of the National Task Force for Economic Justice, supporting the Canadian Center for Women's Empowerment in ending financial abuse. Her work has been featured in The New York Times, Real Simple Magazine, and Refinery 29.



Penelope Burk

Penelope Burk understands donors and what they want more deeply than just about anyone in the business. For over two decades, she and her innovative firm, Cygnus Applied Research, Inc., have conducted surveys and research studies with more than a quarter million donors. She has reached back into their lives to find out about the first time they gave, what motivates their philanthropy now, what their greatest and most frustrating experiences in giving are, and what their dreams are for their philanthropic future.

Penelope's contributions to the fundraising industry can be best summed up as a long list of "firsts":

- She was the first fundraising author to back up her ideas and solutions with evidence from donors
- The first to bring the problem of Donor Attrition to the attention of the fundraising industry, pointing out how much money charities were losing by failing to hold onto their donors
- The first to offer an evidence-based formula for keeping donors giving longer and inspiring them to make more generous contributions
- The first to document what leadership volunteers do best and how they can raise more money for their organizations by saying thank you the donor-centered way
- The first to document the real impact of the high rate of turnover among professional fundraisers and the first to bring innovative solutions to the table to keep fundraisers loyal, raising more money, and still leaving the office at 5 o'clock!



Randell Adjei

Randell Adjei is an entrepreneur, speaker and spoken word practitioner who uses his gifts to Empower the message of Alchemy. He was recently appointed Ontario's first Poet Laureate. Randell, is the founder of one of Toronto's largest youth led initiatives; Reaching Intelligent Souls Everywhere (R.I.S.E Edutainment). In 2018, R.I.S.E received the Toronto Arts Foundation's, Mayor's Youth Arts Award. Randell is the author of "I am Not my struggles," a powerful Anthology released in 2018. Randell was also named CBC's Metro Morning's Torontonian of the Year in 2015 and NOW Magazines Local Hero in May 2017. In 2020 Randell opened up for President Barack Obama at the Economic Club of Canada.





Jess Merber

Jess Merber is the Associate Director, Private Giving Foundation, Philanthropic Advisory Services, TD Wealth. As part of the leadership team, she works with multi-generational families to help them maximize their philanthropic impact and establish tax-efficient charitable legacies as part of their financial and estate plans. She speaks to clients and advisors across the country on the topics of philanthropy and charitable giving, with a focus on women and families. Jess is trained in reputation management, mediation and conflict management. She holds the Family Enterprise Advisor designation among her credentials. Jess believes in service and has been recognized by the Ontario Government for her volunteer efforts. She served as Director and Chair of the Board of ACCESS Community Capital Fund, a Toronto non-profit organization dedicated to alleviating poverty through microloans, business training and mentoring. She is a member of the Waterfront Toronto PlayPark Campaign cabinet and has been a TD Ready Commitment Ambassador since the program started in 2019.



Hilary Pearson

Hilary Pearson has had a twenty-year career in the field of foundation philanthropy in Canada. As the founding President of Philanthropic Foundations Canada from 2001 to 2019, she collaborated with many of the largest charitable foundations in the country. Author of numerous articles, book reviews and columns, Ms. Pearson speaks frequently on Canadian philanthropy at conferences and workshops in Canada and globally. She writes a regular blog on trends and issues in foundation philanthropy for her website, www.hpearson.ca and acts as a strategic advisor and facilitator for family and independent foundations. She is the author of *From Charity To Change: Inside the World of Canadian Foundations* (2022, McGill Queens University Press).



Arti Freeman

Arti Freeman President and CEO of Definity Insurance Foundation, a national philanthropic organization that works with charitable partners across Canada to address barriers to good health, socio-economic opportunity, and climate-related challenges by supporting solutions that focus on the roots and impacts of inequalities. Arti has over 20 years' experience in the philanthropic and nonprofit sector. Her ability to lead and bring diverse players



Vani Jain

Vani is a dedicated and experienced leader with a passion for systems change. Throughout her work in medical education, mental health, corporate social responsibility and philanthropy, the key thread in Vani's career is a true passion for meaningful, long-lasting social impact. Prior to joining the Daymark Foundation as founding Executive Director, Vani led the McConnell Foundation's mental health, well-being and K-12 education portfolios. She has also

and sectors together to address systemic challenges speaks to her strong commitment to advancing positive social change. Her innovative approaches to high-impact philanthropy have been featured by The Philanthropist and the Grantmakers for Effective Organizations. Arti has lived and worked in several countries, including India, the Philippines, Belgium, South Africa, and ultimately made her home in Canada.

held roles in communications, public policy, government relations, and program development.



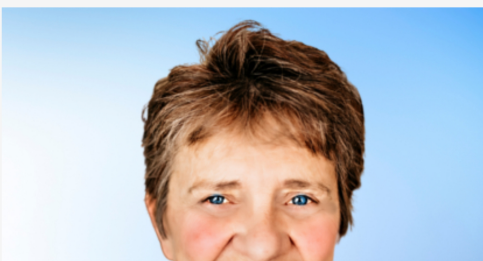
Sophie Prescott

Sophie Prescott is the Development Coordinator at the Almonte General Hospital-Fairview Manor Foundation, working and collaborating with our community and partners to ensure exceptional health care is offered close to home. As a seasoned professional in digital marketing, events, and communications, Sophie thrives on crafting impactful narratives and fostering connections in the digital realm. Her journey in philanthropy is driven by a fervent passion for engaging with diverse communities and spearheading fundraising initiatives that make a meaningful difference. Sophie is also proud to be an active member of the Mississippi Mills Inclusion Project, a grassroots initiative led by local BIPOC business owners and volunteers. Together, they strive to foster inclusivity and equality within their community, working tirelessly to create positive change and amplify underrepresented voices.



Theresa Butler-Porter

With over two decades of fundraising expertise spanning social justice, education, and healthcare, Theresa is a seasoned professional in the field. Prior to joining the PGgrowth team (pggrowth.com) she was a key contributor to the Lakefield College School Foundation underscoring a longstanding and personal commitment to advancing education through philanthropy. A turning point in her career occurred ten years ago during a presentation in Toronto, where she was introduced to TD's influential 2014 report - Time, Treasure, Talent: Canadian Women and Philanthropy. This encounter sparked her interest in the unique impact of women's giving, propelling her to actively engage with the Women's Philanthropy Institute: Lilly Family School of Philanthropy at the University of Indiana. Theresa's commitment to elevating the voices of female donors was highlighted in a recent collaboration with PGgrowth, where she led a webinar shedding light on the often overlooked, and underrecognized, role of women in philanthropy.





Betty-Anne Howard

For over 25 years, Betty-Anne has been guiding individuals, couples, and families to realize their financial dreams. Prior to that time, she worked as a social worker and taught at Queen's University and St. Lawrence College in Kingston. She currently specializes in strategic philanthropic planning and has redirected millions of dollars to the charitable sector while dramatically reducing taxes for those clients she has assisted. Betty-Anne is an accomplished author and speaker. She has been interviewed by many different publications including The Globe and Mail, Carleton University's publication, Philanthropy in Action and featured in other charity newsletters.

FRANK Talks Speakers



Tanya Rumble

Tanya is a racialized settler living in Tkaronto. She is a fundraising leader who has raised millions for some of Canada's largest charities including Heart and Stroke Foundation, the Canadian Cancer Society, and McMaster University. Tanya is currently Executive Director, Development for the Faculty of Arts and Yellowhead Institute at Toronto Metropolitan University (formerly Ryerson), Co-Founder of Recast Philanthropy, and Instructor in the Post-Graduate Fundraising Program at Humber College. As a racialized philanthropy professional Tanya is honoured to share her influence and insights with students, emerging professionals and



Devika Shah

Devika Shah is executive director of Environment Funders Canada, a network of 75+ funders working together to respond to environmental crises with ambitious and innovative solutions. She is passionate about nurturing systems-change solutions that are grounded in regenerative economic development, social justice, equity and active democratic engagement. Shah has held positions with Social Planning Toronto, World Wildlife Fund Canada, Pembina Institute, York University and KCI Philanthropy. In these roles, she has strengthened organizational capacity in the areas of public engagement, advocacy, strategic

...integration and planning, fundraising and operations management. Tanya writes articles; generates research and thought leadership; and facilitates learning events on the topics of diversity, inclusion, equity, power, privilege for the fundraising and philanthropic sector regularly.

...integration and planning, fundraising and operations management.



Jenny Mitchell

Founder and president of Chavender, Jenny Mitchell (CFRE, DMA), works closely with not-for-profit leaders to change the world - one mission at a time. Chavender assists clients, across Canada and the U.S., to inspire their donors and achieve their fundraising goals through personalized fundraising coaching and training. Before completing her CFRE, Jenny trained as a classical musician and earned her Doctorate of Musical Arts. She brings her creative approach, her drive for excellence, and her passion for people to the world of not-for-profits.



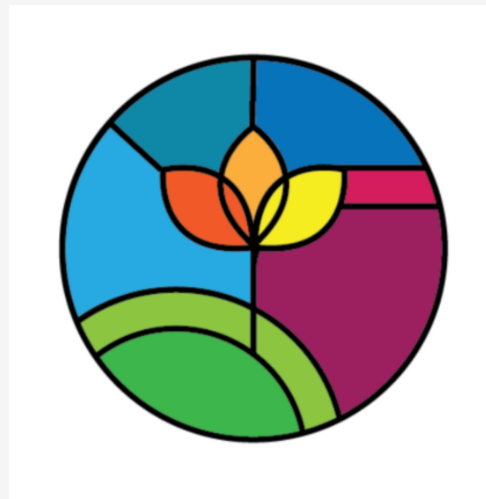
Joel Bray

With almost two decades of experience, Joel's deep-seated commitment to philanthropy led him to attain the coveted MFA-P designation and he stands as a proud member of the CAGP. As an advocate for the seamless integration of charitable giving within financial planning, Joel encourages his clients to incorporate intentional philanthropy into their financial strategies. With his holistic approach to financial well-being and philanthropic endeavors, Joel continues to inspire and lead both his clients and peers toward a brighter financial future and a better world.



Vinod Rajasekaran

An award-winning innovator, Vinod Rajasekaran is CEO & Editor-in-Chief of Future of Good, a fast-



Tyler Boyce

Speaker bio coming soon

growing media and learning organization equipping changemakers with essential news, insights and knowledge on transformations and innovations shaping the social purpose world. Tens of thousands of changemakers subscribe to Future of Good everyday to fuel their learning, development and decision-making. Future of Good's groundbreaking summits on Black Leadership in Social Impact, Dismantling Digital Barriers and Social Finance Forum have convened more than 5000 changemakers to learn, gain knowledge and make a bigger difference at work and on the causes they care about.

Session Speakers



TwinRiver Capital

Adam Jagelewski

Adam is Managing Partner at TwinRiver Capital. In this role, Adam works with investors and advisors to bring positive social and environmental impact into investment and philanthropic portfolios.

Adam has over a decade of experience in impact investing. He co-founded the MaRS Centre for Impact Investing and was the Executive Lead, advising private investors and the public sector on impact strategies and investment models. He also hosted Canada's annual Social Finance Forum, one of the most prominent conferences in the field globally. Prior to MaRS he was a management consultant with PriceWaterhouseCoopers.



Refocus Communications & Fundraising

Aimée Lindenberg, B.Tech, CFRE

Aimée Lindenberg wants to make the world a better place. And as Founder and Chief Engagement Officer of Refocus Fundraising, she gets to help non-profits make the world better every day.

With over 20 years of marketing and communications experience, a tender heart and insightful mind, and being one of the first in the world to receive a Certificate in Philanthropic Psychology, she shares new approaches with charities to help them better engage their supporters.

Specializing in fundraising communications and legacy giving, Aimée loves giving organizations a voice and inspiring charity supporters to give to the causes they care about.



PricewaterhouseCoopers LLP

Alex Kerslake

Alex is a Senior Manager in the Private Wealth practice of PwC Canada, working exclusively with high net worth families. Alex advises on tax planning strategies including philanthropy for individuals, trusts, estates, and corporations. His work on identifying the impact of new legislation for family trusts has been published by the Canadian Tax Foundation. He is called to the Bar of Ontario, and a graduate of the Master's in Taxation Law program at Osgoode Hall Law School. Alex also holds a Chartered Financial Analyst designation, is a Certified Financial Planner and is a member of the Society of Trust and Estate Practitioners.



The Ottawa Hospital Foundation

Angela Mayer

Angela's fascination with marketing started early — when her friends were playing with Legos, she was writing commercials for her Barbies. Fast-forward to today and Angela is a seasoned copywriter, digital marketer, and social media specialist with nearly a decade of experience helping brands become fan favourites. Now, after leaving the agency life behind, she's using her expertise to make an impact. Whether it's a fresh social media strategy or a lead-generation campaign, Angela's on a mission to tell clickworthy stories that capture hearts, minds, and support.



Temple Sinai Congregation of Toronto

Ann Rosenfield, MBA, CFRE

An acknowledged leader in Jewish philanthropy, Ann Rosenfield works directly with donors as a one-person fundraising shop at Temple Sinai of Toronto. Ann's has been interviewed by the CBC, Toronto Star, Macleans, Associated Press and other media on fundraising.

She has spoken on philanthropy across Canada and internationally including a master class for the International Fundraising Conference in Amsterdam and several courses in San Francisco. Ann also serves as a Governance volunteer for Rainbow Railroad, a LGBTQI+ refugee charity.



Abundance Canada

Barbara Chambers

Barbara is a passionate marketer, with nearly three decades of strategic marketing communications leadership in the non-profit sector. She is currently the Director of Communications with Abundance Canada, a public foundation that offers donor-advised funds. Barbara has a long history of utilizing her planning, branding, and fundraising insight to champion diversity, equity, and anti-oppression agendas. She is a member of the International Association of Business Communicators (IABC) and the Canadian Association of Gift Planners (CAGP). She currently serves on the CAGP Foundation Board.



KBF Canada, Myriad Alliance for Borderless Giving

Benoît Fontaine

Benoît Fontaine is the Executive Director of KBF Canada, part of the Myriad Alliance for Borderless Giving, a large international philanthropic network that brings together donors, philanthropists, and organizations that are ready to change the world. He has worked in international philanthropy for 25 years, starting at the Kina Baudouin Foundation.



Assiniboine Community College

Beth Proven, CFRE, BA, CIM

Beth Proven has been in fundraising and not-for profit administration since 1994, first starting out working for various arts organizations, moving to university fundraising for 19 years



Assante Financial Management Ltd

Betty-Anne Howard

For over 25 years, Betty-Anne has been guiding individuals, couples, and families to realize their financial dreams. Prior to that time, she worked as a social worker and taught at Queen's University and St. Lawrence College in Kingston. She currently

the largest foundation in Belgium and a major foundation on the world stage. He was in charge of the entrepreneurship program, the Observatory of Associations and Foundations, which compiles data and trends on the charitable sector, and various capacity-building programs for non-profit organizations.

university fundraising for 18 years (10 in planned giving), two years at a children's hospital, six years at the Winnipeg Symphony Orchestra and is now has returned to her roots in the rural Manitoba as an Advancement Officer, Major Gifts at Assiniboine Community College in Brandon, MB. A regular speaker at CAGP locally and nationally, Beth is also the recipient of the National Friend of CAGP Award, as well as the Provincial Chapter's Friend of CAGP Award.

specializes in strategic philanthropic planning and has redirected millions of dollars to the charitable sector while dramatically reducing taxes for those clients she has assisted. Betty-Anne is an accomplished author and speaker. She has been interviewed by many different publications including The Globe and Mail, Carleton University's publication, Philanthropy in Action and featured in other charity newsletters.



Miller Thomson LLP

Brittany Sud, HBA, JD, TEP

Brittany is a member of the Private Client Services and Social Impact practice groups at the Toronto office of Miller Thomson LLP. She has developed and implemented cohesive estate plans for clients, reflecting their financial objectives and both short and long-term goals. Brittany has vast experience drafting multiple wills, inter vivos trusts and domestic contracts, and has advised high net worth individuals, entrepreneurs and professionals on testamentary charitable giving, the taxation of trusts, disability planning, estate freezes, business succession planning, probate planning and planning for beneficiaries and assets outside Canada. Brittany also advises trustees and beneficiaries on all aspects of estate administration, including preparing probate applications and the administration of the Canadian estates of non-residents. Brittany advises charities and not-for-profit organizations on various matters to achieve their mission.



UNESCO-Ready Campaign Committee

Candace Wasacase-Lafferty

Candace Wasacase is a citizen of the Kakhewistahaw First Nation. As an entrepreneur and advocate she has led some of Saskatchewan's most iconic builds. Recently recognized by the Canadian Society of Landscape Architects, Candace is currently the operational lead for the new urban First Nation development Kakhewistahaw Landing in Saskatoon and the CEO of the Mantiou Stone Centre. She currently chairs the UNESCO Ready Campaign for Wanuskewin Heritage Park. Indigenous philanthropy is at the heart of her approach and believes in the principles of good relations and reciprocity.



Advisory Money Strategies Inc

Chanchal (Sisi) Chakrabarti, CLU, CHS, MFA-P

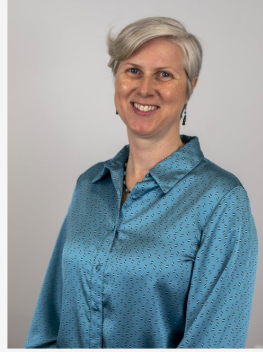
Chanchal (Sisi) is the Managing Partner for Advisory Money Strategies Inc, an Estate & Financial Planning firm that assists with Family, Business transitions & Legacy Planning. Sisi has been in the industry for over two decades and holds the CLU, CHS and MFA-P designations. He is a member of the Estate Planning Council of Canada, Estate Planning Council of Mississauga, CALU (Conference of Advanced Life Underwriters) and is on the Planned Giving Committee of Humber River Hospital, Toronto. He is very passionate about engaging the next generation into Planned Giving!



Good Works

Charlotte Field

Charlotte is a fundraiser and digital native with more than a decade of experience in communications and fundraising. She's a strategic thinker with a mind for integrating offline and online tactics to create cohesive donor journeys that generate exceptional results. As a partner at Good Works, she's worked with charities of all sizes and causes to raise funds from annual and legacy donors. Charlotte is a co-author of 'You Can't Take It With You: The Art & Science of Legacy Fundraising' (2019), a regular on the conference circuit, and pronounces 'GIF' with a hard 'G'.



The Princess Margaret Cancer Foundation

Christie Geen-Difede

Manages the charity's interest in estates which name the Foundation as a beneficiary. Ensures receipt of information to comply with fiduciary duties of a charitable beneficiary, assesses issues and considers options for resolution, focusing on collaboration. Previously held a senior law clerk role, in a boutique law firm, specializing in estate administration. Also, a licensed paralegal with the Law Society of Ontario.



Queen's University

Christina Parfitt, CFP

Christina started her career at RBC Dominion Securities with a wealth management team providing clients with a customized holistic wealth approach and completed her Certified Financial Planning designation. In 2014, she transitioned to the Investment Services team at Queen's University, where she was involved in investment and treasury activities for the university. She's now been with Queen's Gift Planning team as Senior Estate & Trust Officer for 7 years, where she brings together her institutional knowledge with experience in investment, tax and estate planning. Outside of work, she enjoys time with her husband and two kids at their nearby family cottage.



McGill University

Christina Vroom

Christina Vroom is the Associate Director, Bequests & Planned Gifts at McGill University. With over 19 years of fundraising experience in annual, special, major and planned gifts, Christina is a passionate relationship fundraiser



Alberta Cancer Foundation

Christy Soholt, CFRE

Drawn to philanthropy to put her marketing knowledge to work to advance cancer care, Christy landed at the Alberta Cancer Foundation in communications in 2009. After 4 years, she evolved into gift planning and found the perfect mesh of marketing and



Epilogue for Charities

Daniel Goldgut, J.D.

Daniel Goldgut is the Co-Founder & CEO of Epilogue. He spent 4 years in Toronto as a tax and estate planning lawyer for high and ultra-high net worth clients. Now, he's on a mission to democratize estate planning for all Canadians with Epilogue.

helping donors and organizations achieve meaningful philanthropic and fundraising goals. Christina is a member of CAGP, sits on RUQDP (Regroupement des universités québécoises pour les dons planifiés) and is a certified Commissioner of Oaths. Christina is currently a Regent on Mount Allison University's Board of Regents.

donor relationships that is legacy giving. Leaning into CAGP's educational offerings, research, experts in the field and relationships, Christy built a legacy program for the Alberta Cancer Foundation that had identified two new legacy intentions in 2017 to one that celebrated 145 new identified intentions in 2023. Christy also proudly serves as co-chair of the Alberta North CAGP Chapter.



Anchor Marketing

Danielle Gagner

As founder and president of Anchor Marketing, Danielle Gagner brings decades of experience, and strategic guidance to every client. In just 5 years, her agency has garnered multiple awards and experienced rapid growth. Outside of Anchor, Danielle is deeply involved in mentorship programs, serves as a private consultant, and prizes her role as a mother above all. Committed to marketing for good, Danielle and her team aim to help drive significant global change by using their marketing talents to advance and amplify the missions of nonprofits and ethical businesses alike.



Cardinal Capital Management

DeWayne Osborn, CPA, CGA, CFP, MFA-P

DeWayne is a leading authority on planned giving. DeWayne's Certified Financial Planner®, Chartered Professional Accountant (CPA), and Certified General Accountant (CGA), and MFA-P professional designations and over 25 years of advising donors and financial advisers on making significant gifts and starting up their own charitable foundations, have made DeWayne a sought-after public speaker and consultant. In 2011, DeWayne received the Canadian Association of Gift Planners highest award – Friend of CAGP, and was also selected as the inaugural recipient for the Manitoba Chapter's Friend of CAGP.



Assante Private Client

Dilmini Bonas

As Regional Vice-President, Wealth Planning, Dilmini works closely with financial advisors and their high-net-worth clients to identify issues and provide complex, tactical wealth planning support that complements the client's wealth plans. Dilmini has a particular focus on estate planning and wealth transfer strategies for business owners, professionals, and other affluent individuals and families. In her role, she is responsible for assisting, establishing and implementing individualized estate plans that prioritize a client's wishes. Philanthropy and charitable giving are close to Dilmini's heart and are often the focus of her engagement with clients and their families about their legacy building.





Miller Thomson LLP

Elena Hoffstein

Elena has a practice focused in all areas of estate planning, family business succession planning, corporate reorganization both pre and post mortem planning. She also advises on cross border and international matters, will, trusts and marriage contracts. Elena is also a recognized leader in charity law advising both charities and donors on legislative, tax and regulatory matters and on tax effective charitable gifting. Elena frequently advises clients on family business succession and planning, corporate reorganizations. Having regards to different legal and tax regimes, Elena ensures that multijurisdictional property and family business interests are protected. Representing clients in both contentious and non-contentious estate litigation matters, Elena assists with will challenges, mental capacity matters, applications for advice, direction of the court and the passing of fiduciary accounts. Elena is recognized as a leading expert in charity and not for profit law. In Elena's charity law practice, she advises charity clients on legislative, tax and regulatory matters and provides proactive advice to both charities and donors on tax effective charitable gifting.



McMaster University

Eli Clarke

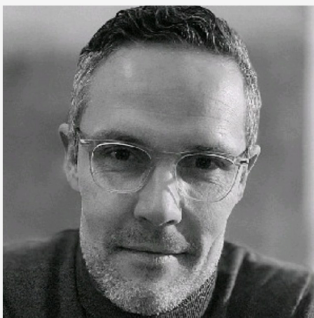
Everyone deserves an education, regardless of financial background. As Manager, Estate Giving and Legacy Planning at McMaster University, Eli builds meaningful relationships to provide access to education to train engaged citizens and create a more just and equitable world. Prior to McMaster, Eli was a Senior Development Officer, Gift Planning at the University of Toronto after overseeing the Multiple Sclerosis Society of Canada's legacy giving program. Before beginning his career in fundraising, Eli was a sought-after professional tuba player who performed across North America and was a founding member of Band Bajha Brass, North America's first Bollywood Brass Band.



FDC Foundation

Elisa Williams Schroen, CFRE

As the Manager of Philanthropy for the FDC Foundation, Elisa investigates and evaluates giving opportunities that further their mission: To improve patient outcomes through the support of healthcare initiatives in the areas of research, education and innovation. Prior to joining FDC Foundation, Elisa managed stewardship operations for the University of Toronto's Faculty of Medicine where she implemented the first comprehensive donor recognition program for the school. Previous to her work at the University of Toronto, Elisa was a member of the Leadership Giving team at the Princess Margaret Cancer Centre Foundation, where she raised over \$2 million annually in intermediate-level gifts toward cancer research.



Centraide of Greater Montreal

Emanuel Euvrard

Emanuel Euvrard is an experienced manager, relationship builder, business developer and fundraiser. After nearly 20 years in the luxury retail



The Ottawa Hospital Foundation

Erin Nazarali

As a digital marketing and communications specialist with



Canada Life

Evan Connell

For more than a decade, Evan has worked in several sales roles including Life Manager and Sales

nearly 20 years in the luxury retail and crafts sectors, Emanuel reoriented his professional work towards non-profits. He set up the Canadian Association of Violin and Bow Makers, before joining the Montreal Symphony Orchestra's Major and Planned Giving team in 2018. A few years later, when Centraide of Greater Montreal was looking to develop a fully-fledged Planned Giving department, he joined the organization to set up and manage this new service.

more than ten years' experience in the non-profit space, Erin has a proven track record of creating unique, memorable and integrated user experiences across a variety of platforms. A strong believer in continuous learning, Erin is fueled by data, analytics, and working alongside an incredible team of innovative marketers. She never shies away from a good A/B test, and loves applying new learnings to inform creative solutions.

Consultant for Canada Life, focused on life insurance, and living benefits planning. His territory spanned across Central Ontario providing support for advisors focused on insurance planning. He currently helps to create innovative insurance tools and sales strategies to support wholesalers and advisors across Canada in having important financial, estate and legacy planning conversations with clients.



Humanity Financial Management Inc.

Gordon Holley, CPA, CA, FCPB

Gordon is a recognized leader who works with social purpose organizations and First Nations to build their Internal capacity for financial management and financial governance. As CEO, Gordon exemplifies our bold vision of what it means to operate with social purpose and social conscience (doing good while being good). In 2020, he led his team's groundbreaking achievement to become the first BCorp CPA accounting firm in Canada. In 2022, he realized his goal of becoming a Benefit Corporation; the first accounting firm in British Columbia to do so.



Harvey McKinnon Associates

Harvey McKinnon

Harvey McKinnon is considered one of North America's leading fundraisers. He has keynoted conferences from Australia to Norway, has taught master classes at the IFC in Europe & been a fundraiser for 40 years. He's spoken at the AFP Icon two dozen times, and was the highest rated speaker at the last AFP Icon conference he spoke at. He is the author of six books including the number one bestseller The Power of Giving, which is been translated into nine languages. His latest book is: The Healthy Nonprofit: Inspirational Thoughts on Leadership, Purpose and Success.



Good Works

Holly Wagg, MA, CFRE

Holly Wagg, CFRE leads both the people and business at Good Works - a Canadian fundraising agency that specializes in direct mail, digital and legacy giving for annual donors. She the proud co-author of You Can't Take It With You: The Art & Science of Legacy Fundraising (2019) and she co-founded the Ten Oaks Project in 2004 for which she was honoured with a lifetime achievement award in the queer community before she cracked 30. She's a widowed, and re-married, mother of six (two adopted, one bio and three step-children) who you can often find adventuring outdoors or trying to be better at CrossFit, gymnastics and yoga.

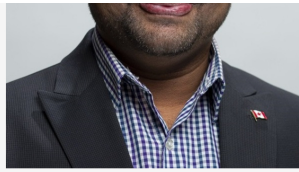




Carleton University

Holly Greatrex, BA/21, CFRE

Holly Greatrex is a CFRE, a proud Carleton alumna and the Director of Personal and Planned Giving at Carleton University. Holly has over 18 years of fundraising and professional experience and is an active member of the Canadian Association of Gift Planners (CAGP). Holly develops and manages Carleton's proactive planned giving programming, marketing and fundraising plans-including the design and delivery of the Carleton University Giving Insight newsletter, surveys and other lead generating marketing efforts and tools. She works closely with donors to design gift plans that maximize tax and financial benefits while achieving their philanthropic goals.



Imam Irshad Osman, MSc, CFRE

Irshad Osman (MSc, CFRE, CeZM) is an Imam by training and a Fundraiser by profession. Irshad has overseen fundraising portfolios worth millions of dollars to support local and international causes. He builds inclusive communities with passion and deep caring. Irshad brings his lived experience as a BIPOC development professional on three continents and his inclusive interfaith approach to the fundraising and social profit sector. He is an alumni of the first cohort of AFP's Fellowship in Inclusion and Philanthropy, Interfaith America's Interfaith Innovation Fellowship, KAICIID's International Fellowship and many other projects.



Nature Conservancy of Canada

Jackie Mersereau

Jackie Mersereau has been working in the non-profit sector for nearly 15 years working for both big and small environmental organizations. She has been with the Nature Conservancy of Canada for over 5 years, focusing on marketing and strategy to help grow a successful legacy program.



ROM Governors

Janice Correa

Janice Correa, is Associate Vice President, Legacy and Estates at ROM Governors and has had a rich multi-decade journey in the philanthropic sector, traversing borders and bridging diverse communities with a fervent passion for Legacy giving. A true relationship alchemist, she has an unwavering zeal for connecting hearts to philanthropy in the



CHEO Foundation

Janice St-Denis, CFRE

Janice L. St-Denis, CFRE, is a passionate relationship fundraiser with 20 years of experience working in strategic philanthropy, specifically in the areas of major gift fundraising and estate & legacy planning. Janice has worked with The Arthritis Society, Médecins Sans Frontières (MSF), McMaster University, and is



Assante Private Client

Janine Purves, CFP, CPCA

Janine offers over 20 year's experience in the financial industry working in banking, brokerage, and financial planning environments. She also has 8 year's experience in consulting and sales to businesses. In addition to being a fully licensed advisor, her qualifications include the CFP and CPCA designations with a background in economics. Having received many service and achievement awards, she

pursuit of meaningful impact. As a connector and collaborator, she thrives on bringing together diverse stakeholders, uniting them under a shared vision; and architecting innovative approaches as a catalyst for positive change. Prior to leading ROM Governors Legacy Program's growth to a bequest expectancy value of \$50M, she was Director, National Ballet School Foundation and previous to that honed her fundraising skills at Miami City Ballet and New World Symphony in Florida. Janice has been CAGP GTA Co-Chair since 2020, presented at Chapter Education Sessions and Community Engagement Panels and is Chair, 2023 GTA Awards Selection Committee. She has had several editorial features on philanthropy in The Globe and Mail and Toronto Star's Guide to Charitable Giving and Estate Planning and was recipient of 2019 Sweatman Award.

McMaster University, and is currently the VP, Philanthropy at the CHEO Foundation in Ottawa, Ontario. Janice has trained as a death doula through Going with Grace, has earned her National End-of-Life Doula Alliance (NEDA) proficiency badge and is nearing completion of a Palliative Care certificate through Durham College. Janice feels strongly about the need for open conversations about death and grief and has been providing death education to her peers for over ten years. Janice believes that people serving professions should attend to this privilege with great care and compassion; it is her personal mission to help connect others with resources for their own journey. If you'd like to continue the conversation, please connect on LinkedIn.

recognizes the importance of servicing client's needs first. She has appeared on CP24, York Rogers TV, and has contributed to the York Region Business Times, and Forever Young, a newspaper dealing with issues seniors face. She has also been asked to speak at many Business, Professional and Retirement Associations. In 2015 Janine was voted best Financial Planner in Richmond Hill for The Liberal Readers' Choice awards.



Jaya Mootoo

Jaya Mootoo is a detail-oriented, driven professional, poised with an entrepreneurial flare for seeing potential, identifying opportunities, and reaping results. Jaya is dedicated to equity and inclusion in the fundraising sector, and in society. Jaya created a successful, globally recognized fund-raiser: "CRAM-A-CRUISER FOOD DRIVE AND FUNDRAISER", now implemented by numerous Police services across Canada and the US, raising millions of dollars and supplies for various organizations. Having completed the Event Management Diploma



Agents of Good

Jen Love

Jen Love is a storyteller. And not in a poetic sense. In an awkward-and-authentic, cryball-in-throat, let's-get-to-the-heart-and-the-emotions sense... Where vulnerability, values, passion and purpose come first and forever. Let's talk about metrics and meaning, facts and feelings. Jen, filled with an attitude of gratitude, is a Partner at Agents of Good.



Good Works

Jennifer Benedict, CFRE

Jennifer Benedict, Director Client Experience at Good Works Certified fundraising executive (CFRE), experienced senior-level fundraiser and consultant with more than 14 years in the charitable sector, Jennifer has experience managing diverse teams of development professionals, planning and executing direct mail, annual campaigns, corporate giving, corporate social responsibility, fund development, major gifts and mid-level giving for local and national organizations. Jennifer is a certified Death Doula through the University of Vermont Larner College of Medicine and is honoured to be a residential hospice volunteer with Hospice Care Ottawa. Jennifer is a vocal advocate for community death education and believes that

program at Humber College, Jaya continued developing her skills through Humber's Fundraising Management Post Graduate Certificate program, graduating in November 2019. Jaya is the recipient of the 2019 Kevin Allen Scholarship for Excellence in Fundraising.

everyone is entitled to a good death.



The Winnipeg Foundation

Jennifer M. Walton, CFRE

Since her first summer job at the Manitoba Museum in 1991, Jennifer Walton is proud to have dedicated her entire career to Winnipeg's not-for-profit sector. She joined the Winnipeg Foundation in 2021, after a decade leading the University of Manitoba's Research & Prospect Management team through the university's \$600M Front & Centre Campaign. She also worked for 14 years in Winnipeg's vibrant arts scene in development, stewardship and production, and spent 6 years as Principal Pianist for the Royal Winnipeg Ballet's Professional Division. Away from work, she is an avid trailrunner, knitter and accidental ukulele collector.



Environics Analytics

Jennifer Robins

With twenty years of experience, Jennifer supports charities and foundations in their data and analytics needs to attract and retain donors, corporate partners and volunteers. Jennifer joined Environics Analytics in 2014, and brings a wealth of experience in sales, marketing, and analytics across education, not-for-profit, and healthcare industries. Jennifer is an active CAGP member volunteering on the Membership committee, an AFP Canada member, and an AHP Member. She holds an Honours Bachelor of Arts degree in French and marketing management from the University of Guelph and a Masters in Business Administration degree from Hult International Business School.



Resources & Solutions
Professional Corporation

Jos Herman, CPA, CA, CFP, CLU, TEP

Jos Herman, is the founder of Resources & Solutions, a boutique consulting firm. At her firm, she provides private business and personal solutions focused on tax concepts, tax efficient investment and insurance strategies, asset protection and wealth planning. Jos is a CPA, who has spent over 25 years, serving the tax, business and estate planning needs of owner manager clients, professionals and their families. She is able to bring together experience and expertise in a number of areas to create a uniquely integrated financial service that is focused on solving the wealth planning needs of these business owners and professionals. She is a triple threat. She uses her skills to provide an objective perspective related to: 1. Accounting, Tax & Estate complexities 2. Insurance Solutions 3. Legal Considerations



DLA Piper (Canada) LLP

**Kate Bake-Paterson,
BA, LLB**

Kate Bake-Paterson is a lawyer at DLA Piper (Canada) LLP who practices in the area of charities and not-for-profit organizations. She regularly advises organizations on a broad range of issues, including governance and other matters related to incorporating and organizing not-for-profit entities; regulatory compliance (such as obtaining and maintaining charitable registration); receipt of charitable gifts and other planned giving and the conduct of revenue-generating activities. Kate also assist donors in making charitable gifts. Kate is the Past Chair of the Canadian Bar Association National Charities and NPO section and the Chair of CAGP Vancouver Chapter.



KEA Canada Ltd.

**Kathy Arney, CA, CPA,
MFA-P**

Kathy Arney is dedicated to enabling social profit organizations and people in the sector to reach their full potential. She is Founder and CEO of KEA Canada, a firm focused on building capacity, accelerating revenue and maximizing impact for the sector. Kathy's combination of finance and fundraising experience provides a powerful background for helping clients strengthen their organizations and improve their impact. Through KEA Canada, she provides services in a variety of areas including revenue development, capacity-building, strategic planning, board development, campaign planning and management, coaching and training. Kathy held senior positions at Queen's University, UBC, Carleton University, University of Saskatchewan and Banff Centre and clients include arts organizations, community and social service organizations and First Nations and Metis lead organizations. Kathy obtained her MFA-P designation in February 2021 and currently sits on the CAGP Board.



Harvey McKinnon Associates

Katie Dudley

Katie Dudley is a fundraiser with 14 years experience, including at CAMH and Harvey McKinnon Associates. She has worked on many highly successful planned giving programs for a wide range of organizations from Cancer Care Foundation Newfoundland and Labrador to the University of Alberta, Simon Fraser University and Indspire. Over the years she has helped clients raise millions of dollars in legacy gifts.



YMCA Northern Alberta

Laura Swailenko, CFP®



World Vision Canada

Laurie Lowe

UHN Foundation

Laura Rumble, CFRE

TBC

Laura Svajcenko, CFRE

Laura formally found her way into philanthropy by serendipitously finding a pamphlet on the floor of the college she was attending advertising Non-Profit Management. A year later with non-profit management and development skills under her belt, she has not looked back. Now working as a Planned Giving Specialist for the YMCA of Northern Alberta Foundation, Laura is thrilled to share planned giving as a giving option knowing it is an exciting opportunity for donors and charities alike; opening the doors to empowerment and lasting impact. Laura is happy to serve on the CAGP Alberta North Roundtable as Co-Chair with her co-presenter Christy Soholt.

As Executive Director, Philanthropy Engagement, Laurie gives leadership to revenue generating initiatives, including Planned Giving, at World Vision Canada. In this role, she draws on past experiences in both for and non-profit organizations. Previously the Director of Strategy and Business Development for an international Canadian insurer, as well as owning a small consulting shop, she has experienced significant fulfillment in the charitable field. With her roots in major gift fundraising, Laurie loves all things related to personalized donor connections and takes particular pleasure in finding the right philanthropic fit for donors who want to change the world as well as coaching other to do the same – through her work, she wants to change the world, too!



CAGP

Laurie Fox, MBA

Laurie has been a die-hard charity sector professional for close to 2 decades. Most recently, Laurie specialized 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 and launch the Will Power campaign, Canada's biggest effort to make leaving a gift in your Will a social norm.



GlobetrottingFundraiser

Ligia Peña, CFRE

Ligia Peña, CFRE, is an internationally-recognized expert in gifts in wills/legacies. She is President of GlobetrottingFundraiser where she specializes in helping nonprofits develop strategic, data-driven gifts in wills programs. Prior to consulting, Ligia was the Global Legacy Manager at Greenpeace International where she oversaw the organization's global legacy strategy in 14 countries. She is also a Ph.D. candidate at the University of Kent where she's researching national legacy marketing campaigns as a tool to change society's behaviour towards gifts in wills. As an AFP Master Trainer, she's trained countless fundraisers around the globe. She's a sought-after and



Harmonia Philanthropy

Lois Graveline

With over three decades of expertise and experience as a professional fundraiser, I live and breathe philanthropy in all forms. I am the proud founder of Harmonia Philanthropy, where I provide custom-tailored philanthropic experiences while deepening the relationships that exist between donors and charitable organizations. I do this by applying strategic direction and guidance that is rooted in compassion and genuine concern for the health and viability of charitable organizations across Canada. When I'm not assisting donors and charities realize their philanthropic goals, I am a volunteer with various organizations, I serve on the Planning Committees for Ignite Ottawa and PhilEx-specific initiatives with various Private

seasoned international presenter who enjoys sharing her knowledge and empowering nonprofit professionals to think about gifts in wills differently by daring to be creative and innovative.

Wealth Management companies and I am an active member with both AFP Canada and CAGP. As much as possible, I enjoy mentoring junior fundraisers entering the sector. Harmonia Philanthropy is really the perfect culmination of my profession and passion and capitalizes on my strengths as a relationship-builder, an innovative strategist and someone who possesses the strongest commitment to developing meaningful and high-impact relationships between donors and charities.



Lori Guenther Reesor, B. Math, MTS, DMin

Dr. Lori Guenther Reesor (B. Math, MTS, DMin) is an expert in Christian giving (although Mennonites tremble at using the word 'expert' to describe themselves!) She asked Christian donors about their giving during a church basement research tour of Canada. She is delighted that her book, *Growing a Generous Church: A Year in the Life of Peach Blossom Church* is finding an audience among Christians of many denominations.



CHEO Foundation

Megan Doyle Ray

Megan Doyle Ray's broad-based fundraising experience has spanned three decades in the charitable sector and has included working with the Canadian Diabetes Association and The Hospice at May Court. The past 15 years at the CHEO Foundation has afforded her the opportunity to concentrate and specialize in planned giving and build a Legacy program from the ground up while showing and inspiring donors how to create their own lasting legacy for children and families. Always a voracious reader with a degree in English Literature Megan is always ready to hear a good story. She holds a National Certificate in Fundraising Management from the Canadian Centre for Philanthropy and is active with her professional fundraising associations. She is currently Education Chair on the CAGP Ottawa Chapter and Past President of the Ottawa Estate Planning Council. Reading historical fiction and collecting vintage English bone china are two of her favourite pastimes.



Good Works

Melanie Scholz, CFRE

Melanie has more than 11 years of experience in the fundraising sector, conceptualizing and managing innovative direct response campaigns for mail, phone, and digital. Since joining Good Works in 2018, she's worked with nonprofit clients to build their legacy giving pipelines, and communicate with prospective donors through compelling, inspiring – and effective – storytelling. She's a nimble thinker and solution-oriented fundraiser who's naturally able to shift and pivot campaigns strategically in response to changes. Melanie holds a Bachelor in Public Relations from Mount Saint Vincent University, is a member of the Association of Fundraising Professionals (AFP) Ottawa Chapter, and successfully gained her CFRE in 2022.



University of Toronto

Melissa Pang

Melissa is the Associate Director of Digital Marketing & Communications at the University of Toronto, where she oversees and consults on a wide array of the university's digital initiatives. Her focus is on making digital experiences intuitive, compelling and effective. Melissa has over 15 years of experience driving high performance on digital, previously serving advertising and design agencies with a focus on non-profit clients. Her work has won multiple RGD Design Awards and an IABC Gold Quill Award of Merit. She is also an advocate for inclusivity, accessibility, and using digital for the public good.



Norton Rose Fulbright
Canada

Michael Blatchford, LLB, BA

Michael Blatchford is a partner with the global law firm Norton Rose Fulbright. Michael practices from Vancouver, working with charities from all sectors across Canada, helping them to support and carry out their mission while complying with legal and regulatory obligations. Michael represents charities to CRA and advises on all aspects of charity law, including granting, fundraising, donation receipting and social enterprise activities. He also works with registered charities to develop gift policies, and templates, and to plan, document and implement effective charitable gifts and other philanthropic arrangements.



Queen's University

Michelle Pruefer

Michelle's 20 years of client experience in banking, insurance, and accounting were the perfect backdrop for joining the Queen's University Office of Advancement. Her roles over the past 9 years with Queen's have included major and leadership giving, with the past 5 years spent with the Gift Planning Office. She enjoys combining her financial background with her love of educating people and helping them contribute to something meaningful. Michelle recently returned to university to become a Queen's alumna by completing her Professional Master of Education degree. Michelle lives in Kingston with her husband, 2 kids, her Goldendoodle, and her guinea pig.



University of Toronto

Michelle Osborne, CFRE

Michelle has spent her career within the field of strategic gift planning. Since 2007, she has worked in Advancement at the



Mission Fundraising

Bower Carter

Michelle has been raising funds for North America charities for more than 23 years. Her deep experience spans all aspects of



Toronto Foundation

Mohamed Huque

Mohamed Huque has spent his entire career advancing social change, from grassroots organizations to global charities. He is the Director of Community Impact at Toronto Foundation, one of the largest community-based funders in Canada. Previously, he was a consultant advising some of the world's leading NGOs on

University of Toronto. As Executive Director, Gift Planning, she oversees the University's Gift Planning Program, where she and her team work closely with alumni, friends and their advisors to structure legacy gifts that will build a world that is healthy, sustainable and inclusive for generations to come. Having worked for the Royal Ontario Museum Governors and SickKids Foundation, she has been privileged to have dedicated her fundraising career to helping donors achieve their dreams. A U of T alumna, Michelle is a Certified Fund Raising Executive (CFRE) and a long-standing dedicated member of the Canadian Association of Gift Planners. In addition to being Past Chair, CAGP Board, she is faculty member of CAGP's courses. Michelle was the inaugural recipient of the Jasmine Sweatman Award in 2005—a CAGP Toronto Chapter award for outstanding commitment to Gift Planning and in 2015, received the Friend of CAGP Award—CAGP's National award for individuals who embody the spirit and vision of CAGP.

fundraising and nearly every philanthropic sector. Michelle has a passion for donor acquisition and Legacy Giving. She has an extensive background in the areas of fundraising TV, video and digital - both in terms of production and media placement. Michelle takes great pride in helping charities leverage today's emerging trends to better serve their causes and missions.

of the world's leading NGOs on programs that ranged from supporting micro-enterprises in Afghanistan to establishing agricultural co-operatives in Sudan. As a former charity executive, he helped develop Canada's first national reading strategy and also led a frontline agency serving low-income communities. He is a past Board Chair at Amnesty International Canada and Ariane de Rothschild Fellow at Cambridge University.



CAGP

Paul Nazareth, MFA-P

Paul Nazareth has worked in Canada's philanthropic sector for over 20 years. Currently, Vice President, Education & Development at the Canadian Association of Gift Planners (CAGP), and was previously VP at the charity CanadaHelps. Paul has been a philanthropic advisor with a national wealth management firm in a trust company and spent 15 years working with charities from Universities to Churches. Paul is on the board of several charities



Peggy Killeen, CFRE

Peggy Killeen is a multi-decade strategic charitable giving and donor relations expert. Honoured by our community with the "Friend of CAGP" award in 2020, she has served on the board of CAGP and was one of the CAGP Foundation's founding board members. An experienced development practitioner, her current work includes her role as Development Director for the CAGP Foundation and as Senior Consultant for PGGrowth, Canada's largest national consulting firm focused on strategic gift planning programs.



Foundation WCPD

Peter Nicholson

Since 1995, Peter Nicholson has been a recognized leader in Canadian tax assisted investments, with a specialized focus on philanthropic tax planning and tax reduction. Through his work with countless donors, foundations, institutions, and boards, he has helped generate in excess of \$350 million for client donations. Nicholson is also a generous philanthropist in his own right and a tireless supporter of community initiatives. Over the years,

including The Circle on Indigenous Philanthropy 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 and Estate Planning Councils. Paul writes on philanthropy for a variety of publications and regularly appears on national radio and television to speak about creating a personal legacy through charity.

Her mission is to work with authentic leaders to increase the capacity of their organisations to build and sustain fundraising revenue. Gift planning is her passion and purpose.

Nicholson has served as a champion and board member for many foundations all across Canada, such as Winnipeg's Canadian Museum of Human Rights, Children's Hospital of Eastern Ontario and the Ottawa Regional Cancer Foundation.



The National Ballet of Canada

Richard Lefebvre, CFRE

With 25 years of fundraising experience, Richard is currently the Associate Director, Individual and Legacy Giving with The National Ballet of Canada. Additionally, Richard is a part-time faculty member at Centennial College, teaching Fundraising and Financial Management in the Arts Management Program. Richard is Co-Chair of CAGP GTA, and was recognized with the 2022 CAGP GTA Excellence in Legacy Giving Award and is the recipient of the 2023 CAGP GTA Sweatman Award. Richard attained his CFRE in March 2021.



Radiance Advisory

Rickesh Lakhani, MBA

Rickesh Lakhani believes that we are all responsible for each other's success. He is the Founder of Radiance Advisory, supporting social impact organizations and leaders to align their actions with their values and build stronger cultures based on truth and trust. He has over 15 years of experience in the social impact sector, including serving as the Executive Director at Future Possibilities for Kids, a community-based organization serving children, and as the Director, Campaign at United Way York Region, leading an \$8M annual fundraising campaign. Rickesh is a Certified Fundraising Executive (CFRE), sits on the Global Council for the Community-Centric Fundraising movement, and has volunteered with numerous causes and boards.



World Vision Canada

Rockwell Dundas, MBA

Rocky leads Philanthropy & Partnerships, bringing several decades of experience in business development. The breadth of his experience in non-profit and for-profit industries has established a critical skill set of leadership abilities in managing organizations and establishing successful partnerships. Rocky's experience in for-profit industries as an entrepreneurial founder, executive member and investor has further sharpened his leadership skills in team development, volunteer formation and building teams from the ground up to reach new markets. He values lifelong learning, most recently graduating from Norwich University with an MBA in Change Management and Organizational Leadership. Rocky also has deep passions for both his indigenous heritage, as a member of the Métis nation, and for hockey, having been a former NHL player.



DLA Piper (Canada) LLP

Roger Lee

Since his call to the bar, Roger has developed an extensive practice in trust and estate litigation. He assists individuals and charities with respect to their rights under the wills variation provisions of the Wills, Estates and Succession Act, estate administration issues, as well as issues relating to the validity of wills and other testamentary instruments. He also advises corporate and individual trustees, as well as personal representatives, of their legal obligations and duties, and also acts for beneficiaries who question the actions of the executor or the trustees of their particular trusts. Roger has been listed in the The Best Lawyers in Canada directory under Trusts and Estates (Litigation) since 2006, and is recognized by Lexpert® and Benchmark Canada as a leading practitioner in the field of estate and trust litigation.



PearTree Canada

Ron Bernbaum

With an extensive background in law, tax and finance, Ron has blended his proven talent for recognizing, structuring and implementing innovative, yet conservative, financing structures with a sincere, lifelong dedication to supporting philanthropic causes. Amongst his accomplishments, Ron has structured and created an investment fund listed with the Hong Kong Securities and Futures Commission, a REIT listed on the American Stock Exchange, and a family of tax-efficient mutual funds for investment dealers. As early as 2004, Ron presented the use of flow-through shares to philanthropists and charities as a way to reduce the after-tax cost of giving. Ron has the ability to productize tax-efficient financial products that meet both the policy and technical requirements of the tax legislation and he was the driving force in the first flow through donation transactions, the first CRA ruling and the first Revenu Quebec ruling.



Harvey McKinnon Associates

Ryan Garnett, CFRE

Ryan is a Certified Fundraising Executive (CFRE) with more than 10 years of experience helping non-profits raise more money for their causes. At Harvey McKinnon Associates, he's the Head of Integrated Marketing and helps clients develop strategies for integrating their efforts through all channels including direct mail, telemarketing, e-mail, social media, and online. Ryan has been a speaker at a number of fundraising conferences/events including the AFP Toronto Congress, Bridge Integrated Fundraising Conference, AHP International, CAGP, Western Canada Fundraising Conference, and many others.



Hamilton District Christian High



Almonte General Hospital

Sandra Baker, BA, CFRE

Sandra Baker brings expertise in the areas of leadership and governance, major planned and annual giving, strategic planning and sponsorship gained while working in senior leadership positions for a variety of charitable organizations. Sandra is presently serving as Director of Advancement and Admissions at Hamilton District Christian High in Ancaster. This blended role means Sandra has the opportunity to shepherd families and donors as they engage with the school community. Sandra is leading a major capital campaign while growing annual revenues, growing the gift planning program and breaking school admissions records. Prior to joining HDCH, Ms. Baker served as Chief Executive Office of Big Brothers Big Sisters of Halton and Hamilton. She was an active and engaged fundraising CEO, creating a culture of philanthropy among board and staff. Her focus was on increasing revenues in grants, government support, major gift and annual fund while ensuring that every child in the program received safe and productive mentoring from volunteers. Before joining BBBS, Ms. Baker held the roles of Director of Development for Yonge Street Mission, Director of Development and Community Engagement at the Burlington Foundation and she was the Capital Campaign Lead for the City of Burlington's Performing Arts Centre's \$26 million campaign.



Assante Private Client

Serena Hak, MFA-P

Serena Hak has a decade of experience in the philanthropic sector and is committed to helping Canadians realize their philanthropic potential through. She is currently the Executive Director & Partner of The Donor Motivation Program® Canada & Head of Philanthropic Advisory Services at Assante Private Client, a frequent speaker and consults with major organizations to build their unique client philanthropic strategies, processes and their overall vision.

Almonte General Hospital-
Fairview Manor Foundation

Sophie Prescott

Sophie Prescott is the Development Coordinator at the Almonte General Hospital-Fairview Manor Foundation, working and collaborating with our community and partners to ensure exceptional health care is offered close to home. As a seasoned professional in digital marketing, events, and communications, Sophie thrives on crafting impactful narratives and fostering connections in the digital realm. Her journey in philanthropy is driven by a fervent passion for engaging with diverse communities and spearheading fundraising initiatives that make a meaningful difference. Sophie is also proud to be an active member of the Mississippi Mills Inclusion Project, a grassroots initiative led by local BIPOC business owners and volunteers. Together, they strive to foster inclusivity and equality within their community, working tirelessly to create positive change and amplify underrepresented voices.



Miller Thomson LLP

Susan Manwaring, L.L.B., TEP

Susan Manwaring is the national lead of Miller Thomson's Social Impact Group. Susan advises



Carters Professional
Corporation

Terrance Carter, B.A., LL.B., TEP, Trademark Agent



PGgrowth

Theresa Butler-Porter

With over two decades of fundraising expertise spanning social justice, education, and healthcare, Theresa is a seasoned professional in the field. Prior to joining the PGgrowth team (pggrowth.com) she was a key

Impact Group. Susan advises foundations in the field of mission investing and social finance and counsels charities and non-profit organizations on regulatory, compliance and taxation. Susan is a long standing member of CAGP and has been recognized extensively for her expertise and participates widely in sector activities including many public policy discussions related to the regulation of the charity and non-profit sectors.

Terrance S. Carter, B.A., LL.B, TEP, Trademark Agent – Managing Partner of Carters, Mr. Carter practices in the area of charity and not-for-profit law, and is counsel to Fasken on charitable matters. Mr. Carter is a co-author of Corporate and Practice Manual for Charitable and Not-for-Profit Corporations (Thomson Reuters), a co-editor of Charities Legislation and Commentary (LexisNexis, 2024), and co-author of Branding and Copyright for Charities and Non-Profit Organizations (2019 LexisNexis). He is recognized as a leading expert by Lexpert, The Best Lawyers in Canada and Chambers and Partners. Mr. Carter is a former member of CRA Advisory Committee on the Charitable Sector, and is a Past Chair of the Canadian Bar Association and Ontario Bar Association Charities and Not-for-Profit Law Sections.

contributor to the Lakefield College School Foundation underscoring a longstanding and personal commitment to advancing education through philanthropy. A turning point in her career occurred ten years ago during a presentation in Toronto, where she was introduced to TD's influential 2014 report - Time, Treasure, Talent: Canadian Women and Philanthropy. This encounter sparked her interest in the unique impact of women's giving, propelling her to actively engage with the Women's Philanthropy Institute: Lilly Family School of Philanthropy at the University of Indiana. Theresa's commitment to elevating the voices of female donors was highlighted in a recent collaboration with PGgrowth, where she led a webinar shedding light on the often overlooked, and underrecognized, role of women in philanthropy.



RBC Royal Trust

Tom Grozinger

Tom Grozinger provides legal and technical analysis for a national team of trust professionals within RBC Royal Trust. A certified specialist in estates and trusts law by the Law Society of Ontario, he is a frequent speaker and writer on estates and trusts issues. His articles have appeared in legal education programs and in the Estates, Trusts & Pensions Journal, for which he received two Widdifield Awards—one being cited in a judicial case. Tom was the first Chair of STEP's Ottawa chapter, received a STEP Founder's Award (2016) and was recognized for STEP Inside's "Best Article" (2018).



World Vision Canada

Trina Owens

Trina Owens, Head of Planned Giving at World Vision Canada began her career in the corporate sector working in the pension & investment department. 13 years later Trina joined the non-profit charitable sector and became a CAGP member shortly thereafter. She's been on the local CAGP board for 10 years and recently received her MFA-P designation. Trina is passionate about helping others find a meaningful way to leave their imprint in this world while creating a brighter future for others. Stay tuned, she also has her heart set on being the next pickleball champ!



Children's Health Foundation

Vicki Hayter

Vicki Hayter is the Director of Legacy Giving at Children's Health Foundation in London supporting Children's Hospital. A CFRE candidate, she is a proven leader with over 20 combined years of Gift Planning and Major Gift experience in healthcare, education and the arts. Vicki is in her second year as Chair of the London CAGP Chapter and at last year's Strategic Philanthropy Conference, Vicki was named the 2023 Planned Giving Professional of the Year by the Donor Motivation Program of Canada. Vicki is driven by her passion for growth, ability to embrace change and desire to better our local communities.

