

Exemplary Gift Planning Advisor

Purpose

The CAGP Greater Toronto Area Chapter has established this award to be presented in recognition of a Gift Planning Advisor who has displayed a commitment in promoting philanthropy to their clients. Advisors include those supporting clients with wealth planning, tax, legal and insurance services. This award recognizes the advisor whose dedication to estate planning has positively benefitted charities and their clients.

Eligibility

Advisors may nominate themselves. Extra weight will be placed on nominations that come from beneficiaries and/or clients.

The nomination should include the following information:

- technical expertise
- continuing knowledge development
- outstanding ethics and professionalism
- evidence of dedication to estate planning that has positively benefitted charities and their clients
- nominee must have at least 3 years of experience.

Submission Criteria

Each nomination should include the nomination form, the narrative, and any supporting documents. Supporting documents (no more than three (3) pages) are accepted, but only to support the narrative. No new information to be submitted in the supporting documents.

Applicants are strongly encouraged to provide thorough but succinct evidence matching the criteria above to ensure the strongest submission. If in the judgment of the Awards Selection Committee, no applicants meet the criteria, no award will be given in this category. Current CAGP Greater Toronto Chapter Board Members and members of the Awards Selection Committee are not eligible for this award.

Please submit the complete application package via the nomination form found on CAGP's website. <https://cagptoronto.org/strategic-giving-awards/>

Deadline for 2023 nomination submissions is **Friday, June 30, 2023 at 12:59pm**.