

## Exemplary Gift Planning Advisor

### Purpose

The CAGP Greater Toronto Area Chapter established the Exemplary Gift Planning Advisor award to recognize an Advisor who has displayed a commitment to promoting philanthropy to their clients, and whose dedication to estate planning has positively benefited beneficiary charities as well as their clients. Advisors include those supporting clients with wealth planning, tax, legal and insurance services.

### Eligibility

An advisor that has been practicing in their field for a minimum of three (3) years. 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 with specific examples of:

- technical expertise
- continuing knowledge development
- outstanding ethics and professionalism
- evidence of dedication to estate planning that has positively benefited charities and their clients

### Submission Criteria

Each nomination should include the completed online nomination form and any relevant supporting documents such as a supporting letter of nomination or related press coverage. Supporting documents (no more than three (3) pages) are intended to support the nomination form. No new information should be introduced in the supporting documents.

Applicants are strongly encouraged to provide thorough but succinct evidence matching the criteria above to ensure the strongest submission. Co-nominations are also encouraged. If in the judgment of the Awards Selection Committee, no applicants meet the criteria, no award will be given in this category. Current CAGP GTA Chapter Executive 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 GTA's website: <https://cagptoronto.org/strategic-giving-awards/>

Deadline for 2024 nomination submissions is **Friday, August 16, 2024 at 12:59pm.**