



CAGP's 27th National Conference on Strategic Philanthropy (Virtual)

Bursary Application Questions

1. Have you been a CAGP member-in-good-standing for at least 3 months prior to the application deadline (February 8, 2021)?
2. First Name
3. Last Name
4. Job Title
5. Organization/Company
6. City
7. Province
8. Telephone
9. Email
10. What CAGP local Chapter are you affiliated with?
11. What are your objectives in attending the Conference? (Up to 100 words)
12. 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. Please input number of years and not a range of years.
13. 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)

14. What percentage of time is spent on gift planning? (e.g. program design, implementation of gift strategies and/or programming, P&P, gift solicitation, stewardship, researching gift solutions for clients, donor/client follow up, etc.)

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

16. On average, how many events (in person or remote) does your Chapter host annually?

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

18. What is your organization's/company's budget for professional development/continuing education?

19. How many fundraising staff work in your organization? (For fundraising staff; N/A for advisors.)

20. 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.)

21. Additional Comments