CAGP'S 33RD NATIONAL CONFERENCE
ON STRATEGIC PHILANTHROPY

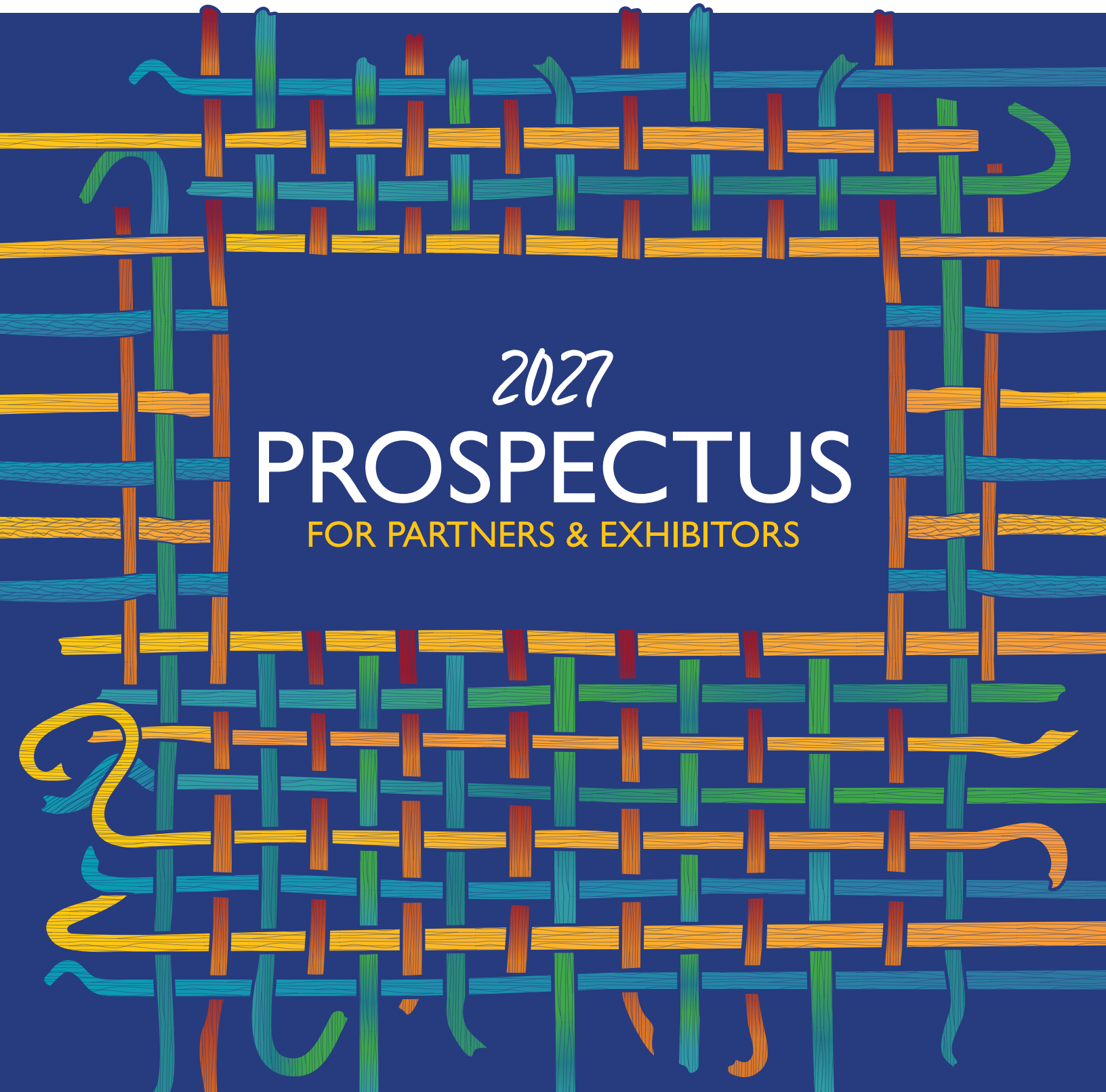
Weaving the Fabric OF GENEROSITY

APRIL 7–9, 2027 | TORONTO

LE 33E CONGRÈS NATIONAL DE L'ACPDP
SUR LA PHILANTHROPIE STRATÉGIQUE

Tisser la toile de LA GÉNÉROSITÉ

7–9 AVRIL 2027 | TORONTO



2027

PROSPECTUS

FOR PARTNERS & EXHIBITORS

An Invitation to be a part of

CAGP'S 33RD NATIONAL CONFERENCE ON STRATEGIC PHILANTHROPY

Please join us from April 7–9 at the Hilton Toronto for CAGP's 33rd National Conference onStrategic Philanthropy.

CAGP champions the growth and development of strategic charitable gift planning in Canada.

Since 1994 CAGP's annual conference has been a premier event for gift planners, fundraisers, professional advisors and senior leaders to exchange information, knowledge and ideas on all aspects of strategic charitable giving.

For 2027, Toronto provides the backdrop for an exciting array of session presenters and plenary speakers designed to provide delegates with the outstanding learning and networking event that CAGP consistently delivers each year.

"CAGP's national conference reflects the very best of the philanthropic sector: thoughtful dialogue, deep expertise, and a shared commitment to learning. Bringing together professionals across disciplines creates a uniquely valuable and inspiring experience. It's an exceptional event, year-after year."

– Serena Hak, CI Private Wealth & The Donor Motivation Program™

Why become a

CONFERENCE PARTNER?

Sponsors and exhibitors are an important part of our National Conference. They play a crucial role in delivering an exceptional conference experience.

PARTNER BENEFITS

Promote & Showcase

Present your brand and products to our delegates and raise your profile above your competitors. Promote your company as a partner of CAGP, the industry leader for strategic charitable giving.

Network & Connect

Connect with charitable gift planners, senior leaders and professional advisors who are recognized leaders in philanthropy. You'll expand loyalty and build opportunities with current and future clients.

We Love You!

We're dedicated to making you part of a truly great conference experience. That's why we like to call our sponsors "partners". We work together to ensure everyone gets the most out of this event.

PARTNERSHIP
Opportunities

In addition to the specific benefits associated with each partnership (see sponsorship grid) all partners and exhibitors will be included on the conference website and will be acknowledged on-site at the conference.

PREMIER SPONSOR OPPORTUNITY

Premier Conference Partner | **$30,000**

With this exclusive sponsorship opportunity, you'll be our main partner on a Conference that will leave delegates with a lasting memory of an outstanding experience. Our partnership will be further showcased throughout the year with an array of branding and promotional opportunities as we market the Conference and build excitement around all it has to offer. An entirely customized package will be created for our Premier Partner.

** Option to purchase the lanyard sponsorship at a 50% discount*

PARTNER SPONSOR OPPORTUNITIES

Education Sponsor | **$15,000**

As the overall Education Sponsor, your company will support the country's premier learning event on strategic charitable giving.

Friend of CAGP Award Presenting Sponsor | **$15,000**

The Friend of CAGP Award is CAGP's highest honour given each year to outstanding leaders and influencers in strategic philanthropy. This year-round sponsorship opportunity culminates in the award's presentation at the conference banquet and is a special time and much anticipated part of the event. With this sponsorship, your company showcases itself as aligned with excellence in the strategic charitable gift planning community.

Emerging Catalyst Award Presenting Sponsor | **$15,000**

This award is CAGP's newest honour. It is a designation awarded by the CAGP Board of Directors to recognize individuals who have demonstrated impact that moves the dial and inspires new paths forward on CAGP's vision for a more generous and just society. The award is presentation at the conference banquet. This sponsorship is year-round and showcases your company's support of CAGP's efforts to recognize those who break new ground and help create a more sustainable future for strategic charitable giving in Canada.

CHAMPION SPONSOR *Opportunities*

Lanyard | **$10,000**

Delegates will wear your company name at all times during the conference.

Delegate Bag | **$8,000**

Delegates tell us they use our unique CAGP conference bags all year long – with your logo on it!

Notebook | **$8,000**

Sponsored notebooks are handy for note-taking at the conference, and beyond.

Conference Website | **$8,000**

The conference website is where delegates go to find information about sessions, social events and registration. This is a high-profile sponsorship for your organization.

Plenary Session | **$6,000 each (6 packages)**

Plenary sessions are the connective tissue of the CAGP Conference, showcasing inspirational and thought-provoking speakers and content, as well as opporunties for connection and networking.

Deep Dives | **$6,000 (3 opportunities)**

One of our most popular education session formats, these informal, extended sessions allow participants to engage with experts in a chosen field and delve deep into the session topic.

First-time Delegates Reception | **$6,000**

A special way for CAGP to welcome first time delegates to the conference and introduce them to our Board and partners.

Banquet | **$6,000**

Thursday night's banquet is a highlight of the conference where CAGP honours its members and treats its delegates to a fine dinner and fun entertainment.

Welcome Reception | **$6,000**

The excitement is palpable at this opening event as delegates come together for their first opportunity to network and connect. This reception is alcohol-free to help create a more welcoming and inclusive event for all delegates. Sponsorship includes providing a complimentary mocktail for every delegate.

CHAMPION SPONSOR *Opportunities*

Sponsored Promotional Sessions

Provide our delegates with a learning opportunity while also showcasing your company's products, services or unique expertise.

- **Early-Bird Breakfast Session (45 mins)** | **$6,000** (2 available)
- **Thursday Afternoon Open Programming (60 mins)** **$8,000** (1 available)

Conference Resources Page | $6,000

Support our paperless journey as important conference materials are posted on our Conference Resources Page.

Conference Mobile App | $6,000

With the Conference schedule being "paper free", all delegates use the mobile app to review conference plenary and session descriptions, presenter bios, venue maps, and more on their smartphone, showcasing your sponsorship throughout the entire Conference.

Conference Registration | $6,000

Support one of the conference's highest-visibility touchpoints—the online registration page and onsite registration desk. As the first stop for every delegate, registration provides valuable brand exposure from the moment attendees register through their arrival at the conference. Every delegate passes through registration, making this an excellent opportunity to showcase your organization.

Exhibit Hall Networking Lounge | $6,000

The exhibit hall is a great place for networking and we have activites to complement the exhibitor booths and encourage delegate interaction. The lounge is a relaxing place within the exhibit area for delegates to recharge and network.

Wordly Translation | $6,000

Support making our conference plenary an inclusive and engaging space for everyone with Wordly AI translation and captioning. Wordly translation will be available during all of our keynote plenaries where you sponsorship will be showcased.

SUPPORTER SPONSOR *Opportunities*

Banquet Entertainment | **$4,000**

During the banquet dinner, your organization will introduce and thank the entertainers for the evening.

Equity-Access Delegate Bursary

Help diversify our CAGP community by bringing someone from an equity-seeking community to the Conference who might not otherwise be able to attend. For those new to our CAGP community, we also throw in a complimentary CAGP membership!

- **Local Bursary | $2,000**
  Covers conference registration for a local delegate of host city.
- **National Bursary | $3,500**
  covers conference registration and a travel stipend to help with expenses for a delegate from anywhere in Canada.

Pre-Conference Day Sponsor | **$3,000**

CAGP's Gift Planning Fundamentals is a signature pre-conference course where delegates will spend the day in deep learning prior to the start of the conference.

Banquet Reception | **$3,000**

The pre-banquet reception is a celebratory time as delegates warm up for a lovely evening ahead.

Quiet/Reflection Space Sponsor | **$3,000**

Sponsor a dedicated space for delegates to use for personal reflection time or quiet conversation.

Conference Social Event | **$3,000**

This evening social event showcases local venues and food and the hospitality of the Host Conference Committee.

Conference Wifi | **$4,000**

The conference wifi access is a complimentary benefit all delegates use during their time at the conference, providing a great profile for your organization's sponsorship.

Photographer | **$3,000**

Sponsor a professional photographer at the conference to capture memorable moments.

Speaker Gift Sponsor | **$3,000**

Be the sponsor to help us say thank you to all of the wonderful speakers presenting at the conference.

Education Session Topic Stream | **$3,000 each or 2 for $4,500 (6 available)**

Support a stream of learning through sessions that align with your company's objectives and priorities.

Breakfast Buffets (3) / Refreshment Breaks (3) / Desserts (2) **$2,000 each or a discounted rate for two or more**

Our breakfasts, refreshment breaks and desserts leave delegates with plenty of time to fuel up, circulate among exhibitors and network.

Charging Station | **$3,000**

Help keep delegates connected throughout the conference by sponsoring the conference charging station. This high traffic area provides delegates with a convenient place to recharge their phones. Your sponsorship will be associated with this value amenity.

Sponsorship Benefit

ADD-ONS

Interested in augmenting your sponsorship? It's a great way to enhance the delegate experience and notch up the profile of your company.

We are pleased to suggest the following sponsorship benefit "add-ons".

- Add a marketing piece to our conference resources page, supporting our paperless journey | **$1,000 (3 available)**.
- Send a targeted email message to conference delegates following the conference to remind them of your services or engage them further with your organization | **$1,500 (2 available)**.
- Promote your company with a promotional item. | **$1,500 (2 available)** Include an 8.5" x 11", one page advertisement or gift in our conference delegate bag (not exclusive). Marketing material or gift provided by your organization. CAGP strongly encourages eco-minded promotional items.

MEETING YOUR SPONSORSHIP OBJECTIVES

We know that our partners may have specific needs and goals for their sponsorship. While we are pleased to share a few ideas and opportunities, we'd be thrilled to customize a sponsorship package that meets your unique interests and objectives. Please reach out to CAGP President & CEO, Ruth MacKenzie, at rmackenzie@cagp-acpdp.org

Conference EXHIBITORS

Why exhibit at the CAGP Conference?

- Exclusive access to your target market of gift planners and professional advisors
- Our exhibit area is fully integrated in our conference floor plan and activities, maximizing interaction with delegates
- Connect with decision makers who are leaders in strategic charitable giving
- Maximize your company's visibility and exposure during extended conference networking breaks
- Build recognition of your company and products for increased brand awareness
- Showcase your latest products and services

Exhibit Booths – up to 15 booths available | **$3,250 (2 days)**

Your package includes:

- One 8'x8' booth space, defined by pipe and drape
- One 6' table, with two chairs
- Standard electrical outlet

Value-Added Benefits of Exhibiting

- Your company's name, logo and website link on the CAGP Conference website
- One complimentary conference registration
- A conference delegate list
- Opportunity to update your database with a draw at your booth
- Link to company website in onsite mobile app

CONTACT OUR CONFERENCE PLANNER

or complete our sponsorship form to confirm your partnership at the CAGP Conference:

Caralen Law
Conference & Event Planner
Canadian Association of Gift Planners (CAGP)
Tel: 613.232.7991 ext. 227
Email: claw@cagp-acpdp.org

THANK YOU FOR YOUR INTEREST

in CAGP's 33rd Annual National Conference on Strategic Philanthropy!

CAGP Conference

DELEGATE PROFILE AND MARKETING REACH

Delegate Overview:

Conference delegates are comprised of fundraising professionals within their respective charitable and not-for-profit organizations, board members, volunteers, professional advisors, lawyers, financial planners, estate planners and insurance brokers. Delegates attend from across the country and there is always a good representation of local gift planners and professional advisors in attendance.

Average Overall Conference Attendance: 450

Years in the Gift Planning Field

49% of attendees are experienced gift planners with 6-20 years in the field.

35% have under 5 years of experience.

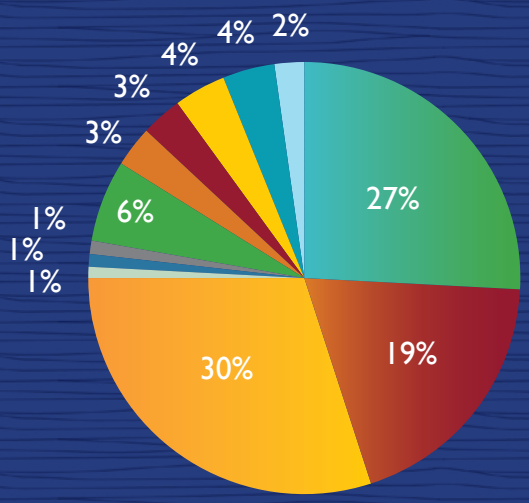
over **16%** have advanced experience of 20 or more years.

Decision-making Role

62% of delegates influence or assist in decisions to purchase gift planning services or products.

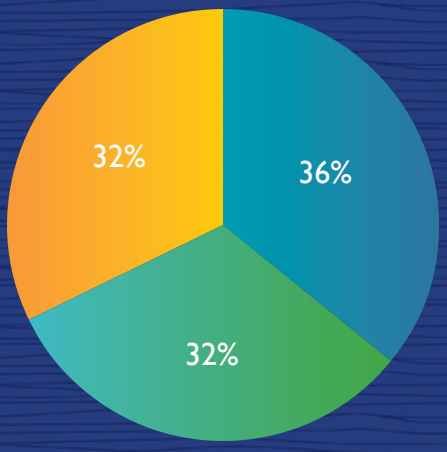
12% have no decision-making role.

26% actually make purchasing decisions.



Delegate's Main Role in Their Organization

- Gift Planner
- Fundraiser
- Gift Planner & Fundraiser
- Gift Planning Consultant
- Lawyer
- Accountant
- Financial Advisor
- Insurance Advisor
- Estate Planner
- Executive Director
- Sales/Marketing Executive
- Other



Size of Delegate's Organization

- Small non-profits with 1–19 employees
- Mid-sized organizations with 20–100 employees
- Large organizations with over 100 employees

Conference Digital FOOTPRINT IN 2026

The 2026 CAGP Conference website was the main source used by delegates to find information about the Conference, with 26,059 page views during the promotional period of the Conference.

Our conference marketing emails reached over 10,749 receipients, with conference attendee-specific emails reaching over **457** people.

Instagram impressions were up 445% during the conference period, with **212** total engagements with CAGP's Instagram content.

98% of conference attendees downloaded and logged into the Conference App in 2026, as our CAGP conference delegates used the App to access their personal agendas and to connect with each other throughout the conference.

LinkedIn impressions were up 424.2% during the 2026 conference period, with **3452** total engagements with CAGP's LinkedIn content.

YOU'LL BE IN GOOD COMPANY

Past Partners and Exhibitors

Abundance Canada
Advocis
Aqueduct Foundation
BC Children's Hospital Foundation
Benefaction Foundation
Blakely
BMO
Canada Life
CanadaHelps
Canadian Donor's Guide
Cardinal Philanthropy
Carters Professional Corporation
CIBC Private Wealth
CI Assante Private Client
DLA Piper (Canada) LLP
DonorPerfect Canada
Environics Analytics
Epilogue
Givewise
Global Philanthropic Canada
Good Works
Kittiwake
Hilborn Charity eNews / Foundation Magazine
IG Private Wealth Management
McCarthy Tetrault
Miller Thomson LLP
Myriad Canada
PearTree Canada
PGgrowth
Raymond James Canada Foundation
RBC Royal Trust
The Donor Motivation ProgramTM
The Foundation (WCPD)
The Philanthropist Journal
Value Partners Charitable Foundation
WellFunded
Willfora

Partnership Benefits
At-a-Glance

BENEFITS	PREMIER*	PARTNER	CHAMPION	SUPPORTER	EXHIBITOR
A customized sponsor package	✓				
Logo on conference electronic materials		✓	✓		
Listing in conference electronic materials				✓	✓
Promotion of sponsor in conference related social media		✓	✓		
Acknowledgement next to sponsored session(s) or event on website		✓	✓	✓	
One complimentary conference registration		✓	✓		✓
Representative to bring greetings at sponsored session		✓	✓		
Introduce and thank speaker at sponsored session (if applicable)			✓		
Provision of delegate list onsite		✓	✓	✓	✓
Company link to website in mobile app		✓	✓	✓	✓
Logo on speaker presentation materials website		✓			
Right of first refusal for same sponsorship for 2027 Conference		✓	✓		

Note: All benefits will be formalized once sponsorships are confirmed. Specific sponsorships may have additional benefits.

CAGP's National CONFERENCE ON STRATEGIC PHILANTHROPY

Sponsorship/Exhibitor Confirmation Form

Company Name _____

(as it should appear on all sponsorship/exhibitor acknowledgements)

First Name _____ Last Name _____

Address _____

City _____ Province/State _____ Postal Code/Zip Code _____

Telephone _____ Email _____ Website _____

Sponsorship/Exhibitor Opportunities

SPONSORSHIP LEVEL	VALUE	PREFERRED SPONSORSHIP *(check all that apply or list specific sponsorship)*
Premier Level — Premier Conference Partner	**SOLD**	
Partner Level (Indicate specific Partner sponsorship)	$	☐
Champion Sponsor (Indicate specific Champion sponsorship)	$	☐
Supporter Sponsor (Indicate specific Supporter sponsorship)	$	☐
Exhibitor (2 days)	$3250	☐
Sponsorship Add-ons (Indicate specific add-on)	$	☐

The sponsorship fee is subject to GST/HST. GST/HST Registration number: 87067 8299 RT0001
Any discounts offered on a sponsorship level will be reflected on the invoice.

Payment

An invoice will follow with the total payment due. Sponsorships/ exhibit space will be confirmed when the application form and full payment have been received and processed. Receipt of the application form with payment indicates acceptance of all rules and regulations governing the sponsorship level purchased.

Please return completed form to:
CAGP Conference Office
613-232-7991 ext. 227
claw@cagp-acpdp.org