CREATING A LEGACY

Paul Nazareth
Vice President, Education & Development,
Canadian Association of Gift Planners

A track record of turning information into inspiration

I sat there in my office, holding the letter in my hands – stunned. A non-donor had included a five-figure gift in their will to us and was inquiring about starting a monthly donation. I was 23 years old, it was the year 2000 and I had just started a job in a new planned giving role at a charity.

I had to pick up the phone to ask the donor how this all came to be? They had not donated to us before, we have no history of engagement – how do they even know what we do? What made them decide to trust us with their legacy and become a highly invested monthly donor?!

That call was the first time I heard about the Canadian Donors' Guide.

Our organization was one of the thousands in Canada who were part of the guide that year, which was given to the donor by their estate planning lawyer with the instruction to include charitable exploration as part of their 'homework' in updating their will as they entered retirement and a post-parental life.

The donors were active members of their faith community, weekly churchgoers who wanted to make sure that all they had worked for would help not just their children after they had gone, but would also build on the giving decisions and investments they had made in line with their values during their lifetime. Although they were familiar with many charities through past donations, charities who had interacted with their church, community and workplaces and the like, nothing felt fitting to them at the time their estate planning lawyer passed them the guide. They were so excited to find out about us and other organizations who they could give to and achieve the giving goals they had in life and beyond.

Fast forward a decade and I'm working for Canada's largest group of churches and serving millions of donors – and need to inform thousands of estate and financial planners about how to leave our charities in estate plans and who to talk to about major gifts like stocks. The Donors' Guide was the tool that was there for our charity at that time, too. The Canadian Donors' Guide helped us reach those advisors and their clients, and was responsible for not just bequests, but for helping us advance strategic giving in life, too.

Enter the digital age and I'm working for a Trust Company with hundreds of advisors with clients who are considering major legacy gifts but are often starting from a place of giving to a few charities each year. When it comes to legacy, most donors want to look at bigger picture solutions and often need a suite of charities to help them achieve their vision. The Donors' Guide was there for our officers to use when talking to clients about giving, without the officer having to endorse any one charity over another. The guide gave them the ability (in print for the many older donors who aren't part of the online world) to expand past a list of usual suspects to really dig into the places of value and impact for each individual client, often, starting a lasting relationship from just one conversation.

Information on causes is out there, Google can provide a million results in a second. The Canada Revenue Agency list of charities is online and is searchable, too, but it's the meeting of the minds and medium in the Donors' Guide that goes out to tens of thousands of advisors that has the superpower to transform information into inspiration for donors as they consider what leaving a legacy even means to them.

It's been an inspiration to me to see both as a fundraiser and an advisor myself how this simple yet brilliant guide has served as a tool for both donors and their advisors to hone in on which charity is solving what problems and connecting them quickly to have a discussion to understand how to make an impact on the problem and solution. There is strength in simplicity, and seeing people connect with the perfect charity that speaks to their purpose is a powerful feeling for all those who want to make charity more than just giving.

Today, 20 years later, as the Vice President of the Canadian Association of Gift Planners I'm proud that our organization and our members across Canada continue to collaborate with the Canadian Donors' Guide team to ensure that even as the digital age evolves - and yes the Guide has gone online -, that there is still a resource for professional advisors to share with their clients that they can look through and fantasize about the legacy they want to leave in the world. And on behalf of our thousands of members, I'm deeply grateful for the key role the Guide plays in connecting donors, advisors and the right charity representative to have the conversation about these important, life-changing gifts.

Whoever you are holding this guide; If you're a generous donor, you'll find that inspiration to connect with a charity that feels right to you. If you're an advisor, you'll find the most important contact information you need to move the gift forward . And if you're a charity you'll find a way to connect with both donors and advisors who need your charity to fulfill their vision for a better Canada and a better world.

Paul Nazareth is Vice President, Education & Development at the Canadian Association of Gift Planners. He has been the VP at the charity CanadaHelps, a philanthropic advisor with a national Wealth Management firm, spent over a decade with charities like the University of Toronto and Catholic Church of Greater Toronto. Paul is on the board of several charities, is Chair of the Advisory Board at the Humber College postgraduate fundraising program, on the Advisory Council of the Carleton Masters in Nonprofit Leadership program, lead faculty instructor for Advisor Education with Knowledge Bureau as well as tax and advisor communities like Advocis, CPA and Estate Planning Councils. Paul writes on philanthropy for a variety of publications as well as appearing on national radio and television to speak about creating a personal legacy through charity.