Gift Planning Capacity - Progressive Steps

Entry Level

- Have charitable status
- Have little gift planning experience

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- Complete Give Green Canada online Gift Planning Course
- Use Give Green Canada website for templates, policies
- Look for mentors in fundraising community
- Identify professional advisors to work with

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- Join Canadian Assoc of Gift Planners and/or Assoc of Fundraising Professionals
- Attend local meetings & training events
- Use CAGP online resources & helpline
- Enroll in events sponsored by community colleges, others
- Work with mentors

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- Attend CAGP week gift planning course in Banff
- Enroll in AFP online courses
- Participate fully in peer networks (develop if not existing)

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Advanced level

- Help others who are just starting out