



Abundance[®]
CANADA

**Executive Director,
Gift Planning**

EXECUTIVE BRIEF



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CANADA

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FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of Abundance Canada. For more information about this opportunity, please contact Sylvie Battisti, Senior Vice President, KCI Search + Talent & Jill Anderson, Senior Search Consultant by email at AbundanceCanada@kcitalent.com

Interested candidates should send their resume and a letter of interest to the email address listed above by **June 17, 2024**. **Please note that candidate submissions will be reviewed as they arrive, so early inquiry and submission is encouraged.** All inquiries and applications will be held in strict confidence.

The hiring salary range for this position is \$150,000 to \$185,000 and Abundance Canada offers a competitive benefits package.

Abundance Canada is an equal opportunity employer and encourages applications from all qualified applicants and especially welcomes applications from racialized persons, women, Indigenous/Aboriginal People of North America, persons with disabilities, LGBTQ2S+ persons, and other underrepresented groups.

Accommodations are available on request for candidates taking part in all stages of the selection process. If you require any accommodations, please notify the Search Consultant.



Executive Director, Gift Planning Abundance Canada

THE OPPORTUNITY

The **Executive Director, Gift Planning** will play a key role in setting the direction for the Gift Planning team focused on achieving ambitious goals, leading a team of professionals, and actively engaging with donors, potential donors, and professional advisors. As a skilled relationship builder, gift-planning strategist and strong communicator, the Executive Director, Gift Planning will develop and execute strategies that grow the network of professional advisors and potential donors, promoting Abundance Canada's strategic and flexible approach to charitable giving.

Reporting to the CEO, the Executive Director, Gift Planning will step into this pivotal executive position joining the core leadership team and will bring strong strategic and leadership skills. As an action-oriented, results-driven professional, the Executive Director, Gift Planning will lead and inspire a team of nine Gift Planning Consultants across the country to excel in their roles.

Abundance Canada is seeking an individual with proven experience developing gift-planning strategies and executing complex giving strategies. The Executive Director, Gift Planning will be a leader in the field of gift planning and be able to apply their creativity, entrepreneurial spirit and strong understanding of the charitable sector and related legislation in this role to help donors across the country make a difference through their charitable giving.

The role can be performed from any Abundance Canada office (Calgary, Abbotsford, Winnipeg and Waterloo) or remotely. Additionally, this position will require some travel to meet with donors, potential donors, and professional advisors; to visit regional offices; and to attend Board, leadership team, staff and Gift Planning team meetings.



ABOUT ABUNDANCE CANADA

Abundance Canada is a public foundation with 50 years of experience helping donors across the country make a difference through charitable giving. In 2023, Abundance Canada attracted \$63.24 million in donations, managed over \$262 million in assets, and distributed nearly \$51 million to Canadian charities. Our goal is to double our reach and impact within the decade.



Over the years, our gift planning has always been ahead of its time and as the organization grew, a network of institutions and donors were attracted to both the vision of charitable giving and the benefit of our services.

Purpose

Abundance Canada believes generosity changes everything. Generosity is transformational for the donor and recipient, and the world is a better place when people live generously. We support generosity through customizable charitable giving plans to help donors increase their charitable impact.

Values

Our values are shaped by a vision of generous living, rooted in our story. These values guide our attitudes, decisions, and actions:

- Our relationship with donors is a sacred trust.
- We serve and act with integrity, professionalism, and confidentiality.
- We commit to the work of justice, inclusion, diversity, and equity.

Everyone at Abundance Canada works together as one team to further our purpose and values. Our staff of 23 dedicated professionals are located across Canada. We pride ourselves in keeping the donor experience flexible and easy, no matter the complexity of their charitable plans.



The History of Abundance Canada

Abundance Canada's purpose is rooted in our history. In the early 1970s, leaders from the Mennonite tradition were inspired to make charitable giving easier for people who wanted to share their financial resources. In 1974, we opened our doors as Mennonite Foundation of Canada.

Beyond encouraging people to share their financial resources, we adopted investment policies that embraced social responsibility. The impact of socially responsible investing (Environmental, Social, Governance) made us a pioneer in ethical/responsible investing. ESG remains a hallmark of our investment policies today.

Our gift planning was ahead of its time and as the organization grew, a network of institutions and donors were attracted to both the vision of charitable giving and the benefit of our services. In 2016, we changed our name to Abundance Canada to reflect our growing and diverse donor base.

We believe generosity changes everything. Throughout our history, we have evolved and adapted, but our values remain the same.

Responsible Investing at Abundance Canada

Responsible investing is about helping build a better world. It's about investing in a way that reflects your values.

Abundance Canada believes in a world where everyone lives generously because generosity changes everything. As a public foundation that offers donor-advised funds, we also believe that how and where we invest is consistent with our values.

Our investment policies incorporate environmental, social and governance (ESG) criteria that are shaped by our values.

Investing our Values

- **Respect the dignity and value of all people** – Abundance Canada will seek to invest in companies that respect and support the basic human rights of all people and who do not attempt to benefit from the misfortunes of disadvantaged individuals or communities. This includes providing fair and sustainable compensation for employees and extending opportunities to all people.
- **Support world peace** – Abundance Canada will seek to invest in companies whose activities and practices contribute to peaceful and healthy relationships between individuals, communities, nations and within society in general. We will avoid investing in companies whose focus is on the development, production, or sale of weapons and other instruments of war and destruction.
- **Promote social betterment** – Abundance Canada will seek to invest in companies that work towards building healthy families and communities through housing, the environment, food, education and health care. Furthermore, we aim to invest in companies that proactively address systemic injustices regarding race, gender, religion, sexual orientation or socioeconomic status. We will avoid investments in companies materially engaged in the production or sale of alcoholic beverages, tobacco, cannabis, pornography and gambling.
- **Observe management practices** – Abundance Canada will seek to invest in companies that operate in an honest, compassionate and responsible manner, value and empower employees, respect workers' rights, engage in responsible resource management, employ sound practices of corporate governance, avoid unnecessary litigation and pursue alternative dispute resolution options, and are competitive but respectful of their competitors.



ADDITIONAL INFORMATION

[Abundance Canada](#)
[About Abundance Canada](#)
[Leadership Team](#)
[Board of Directors](#)

[Our Generosity Plan](#)
[Technical Information Sheets](#)
[Our Gift Planning Consultants](#)
[2022 Annual Report / 2023 Financial Statement](#)

BOARD OF DIRECTORS

Jennifer Thompson, Chair
Shannon Peters, Vice Chair
Alan Walker, Secretary
Arnold Machel, Treasurer

Gillian Doucet Campbell
Roberts Heinrichs
Karen Martin Schiedel
Doug Romanuk
Stephen Yantzi

KEY DUTIES AND RESPONSIBILITIES

- Participate as a key member of the Abundance Canada management team, helping to set direction and achieve the objectives of the organization.
- Lead a team of Gift Planning Consultants by setting strategy; establishing clear objectives; developing their technical, financial and tax planning skills as it pertains to charitable gift planning; building relational capacity; and motivating them to effectively nurture existing and new donor relationships, resulting in increased donations to Abundance Canada for the benefit of charity.
- Help donors define their investment objectives and approach using a deep understanding of the Abundance Investment options.
- Participate in evaluations of existing investment options and influence the selection of potential new options.
- Develop relationships of high trust with donors and potential donors, supporting them in their charitable giving.
- Expand and leverage Abundance Canada's network with outside stakeholders, including professional advisors, to help grow interest in and awareness of Abundance Canada with their clients and potential clients.
- Reach new communities of donors for Abundance Canada.
- Be a leading "go-to" expert in the field of gift planning by communicating complex charitable gift planning scenarios for gift planning consultants, professional advisors, publications, and promotional material.



QUALIFICATIONS AND COMPETENCIES

- A minimum of seven years of progressive and proven leadership, management, and charitable gift planning experience, preferably within an organization that offers Donor Advised Funds in the not-for-profit or wealth management and financial services sectors.
- Senior-level experience successfully building and leading a team, coaching, and motivating others to excel in their roles.
- Extensive demonstrated knowledge and experience in the technical aspects of charitable gift planning, gift planning instruments and related tax laws and a solid understanding of the Canadian philanthropic landscape.
- Demonstrated experience building trusting relationships with a variety of audiences.
- Strong national connections with key groups including accountants, wealth advisors, and professional associations (for example, the Canadian Association of Gift Planners) connected with the sector.
- Proven skills and knowledge in charitable gift planning and key client relationships.
- Superior verbal and written communication abilities, and exceptional listening skills.
- Preference will be given to strong candidates with financial designations.

ATTRIBUTES & QUALITIES

The Executive Director, Gift Planning will model the highest level of character, competence, creativity, and customer focus. Specific attributes include the following:

- **Strategic Thinking and Action:** Creatively think outside the box while effectively operating within set organizational operating parameters.
- **Leadership and Management:** Effectively lead, manage, and mentor a team of professional Gift Planning Consultants.
- **Results:** As a “rainmaker”, create and close on opportunities, deliver targeted results, and help bring the organization to the “next level”.
- **Team Participation:** Positive and inspiring as a team contributor with a charitable outlook.
- **Professionalism, Diplomacy and Discretion:** Operate in a position and environment that requires the utmost in professionalism, meeting commitments, discretion and respect for privacy and confidentiality.
- **Charitable Gift Planning:** Knowledge and experience in gift planning, management of publicly traded shares, bonds, mutual funds, private company shares, life insurance, and other financial instruments; and a clear understanding of related Canadian tax implications.
- **Networking:** Create productive and trusted relationships with professional advisors who represent existing and potential clients.
- **Communication:** Engaged and engaging communicator who understands the importance of strategic listening and asking questions to fully understand needs and identify/create opportunities. Effectively communicate (verbally and in writing) highly technical information, to large and small groups, and individuals.
- **Technical:** High proficiency in working with spreadsheets and data; AI as appropriate; Office 365 Business suite and related software.
- **Organization:** The Executive Director is the custodian of critical institutional knowledge and is effective (personally and with her/his team) in creating and maintaining required records.



BIOGRAPHIES

Darren Pries-Klassen, CEO



Darren enjoys meeting new people and hearing their stories, especially when it includes generosity and support for charitable causes. As a leader, he has helped make Abundance Canada one of the most respected donor-advised foundations in the country.

He joined the organization in 1998 and became the CEO in 2009. For over twenty years he has been instrumental to the organization's growth and in 2016 he successfully led the rebranding process from Mennonite Foundation of Canada to Abundance Canada. A sought-after speaker and writer, Darren is often at sector-related events and his comments and articles are widely published.

Darren brings his integrity and open-mindedness into all aspects of his professional life; building relationships and connections with people to help them live and give generously.

Darren has degrees in Theology and Leadership. He completed the CREST leadership program and holds the Certified Financial Planner® professional designation. Darren has served on several boards. He is the past Chair of both the National Board of the Canadian Association of Gift Planners (CAGP) and the CAGP Foundation Board. He currently sits on the Board of Directors of Imagine Canada. In 2021 Darren received the FRIEND Award from CAGP for his contributions to the charitable sector.

Jennifer Thompson, Chair of the Board



Jennifer Thompson began her career in technology in 1973. She implemented governance and risk management frameworks for large organizations in the retail and financial services industries, such as business processes, systems, and technologies for CPP Investments and overseeing due diligence for corporate acquisitions with accountability for the resulting systems integration and oversight.

As a Board Member for charitable and not-for-profit organizations, Jennifer's guiding principles are giving back to the community and making a difference. She has served as Board Chair for Breakfast for Learning, Chair of the Finance Committee for Eglinton St. George's United Church, and Chair of the Board for Havergal College.



ABUNDANCE CANADA - ORGANIZATION CHART

