

## Find an advisor

The role of an advisor in financial or legal services or that of a professional in gift planning is to act as the intermediary between donors and the charitable organizations.

Only a professional (notary, lawyer, accountant or financial planner) can legally carry out the necessary activities relating to planning a gift.

The title of *professional gift planner* is only applied to the members of the CAGP-ACPDPTM. The person in charge of planned giving at the charity will be able to refer you to useful contacts.

Many professionals, due to their expertise, may be called upon to help clients plan a gift. In light of this, many associations have chosen to associate themselves with our program:

- **La Chambre des notaires du Québec**
- La Chambre de la sécurité financière
- L'Institut québécois de planification financière
- **L'Ordre des comptables agréés du Québec**

### Advisors' point of view