

DEADLINE FOR SPECIAL PRIVILEGES APPLICATION: JUNE 30, 2020.

REQUIREMENTS. An individual will be eligible to receive the MFA-P designation without completing the standard coursework and exams if they:

- A. Provide a detailed resume** which outlines past and current areas of practice and experience in the area of strategic charitable gift planning

- B. Complete a Case Study** (of a minimum of 2000 words) to be shared with MFA-P™ students and graduates, according to prescribed case study outline, based on a real-life client situation in the following subject areas found in section 5 below.

- C. Meet at least two (2) of the following four (4) criteria:**
 - Membership in good standing with the Canadian Association of Gift Planners (CAGP) for a minimum of FIVE years

 - Minimum of 10 years of appropriate and relevant experience in the area of strategic charitable gift planning

 - Completion of CAGP’s Original Gift Planning Course

 - Holding one of the following degrees/designations: CFP, CHS, CLU, CPA, DFA-Tax Services Specialist™, LLB, MFA™, MTI, Pl. Fin, RFP, RWM™, TEP

AND

- Have the approval of the MFA-P™ Advisory Board

AND

- Complete the prescribed application form below and submit the course tuition fee. See below

MFA-P™ APPLICATION FORM – CANDIDATES FOR SPECIAL PRIVILEGES

SECTION 1 – PERSONAL DETAILS

Title	
First Name*	
Last Name*	
Date of Birth	
Gender	
Phone Number*	
Mobile Number*	
Home Address*	
City and Province*	
Postal Code*	
Personal Email*	
Work Email	

*Indicates mandatory field

SECTION 2 - WORK HISTORY (10 YEARS). If you have worked at more than two firms over the past 10 years, please provide full details in your resume.

Current Firm Name	
Address	
City, Province	
Postal Code	
Phone at Work	
Email at Work	
Current Role Title	
Department	
Employment Duties	
Employment Dates	
Immediately Prior Firm Name	
Address	
City, Province	
Postal Code	
Current Role Title	
Department	
Employment Duties	
Employment Dates	
Self Employment Details	
Name of Firm	
Address	
City, Province	
Postal Code	
Phone at Work	
Email at Work	
Your Current Role	
Years in Business	
Number of Employees	

