



**Development Office  
Archdiocese of Toronto**

# ***Advisors List***

The Archdiocese of Toronto has created a list to connect parishioners connect with professional advisors who understand the Catholic faith and can assist in legal, financial and philanthropic planning.

All advisors who serve clients in the areas of finance, law, insurance and philanthropy are welcome to join the list.

Information from this list will be distributed upon request to Catholic parishioners who wish to make financial plans, estate plans and charitable gifts to the entities of the Archdiocese of Toronto. The list will also be used to communicate with advisors, to help them network with peers within the Catholic community.

Each parishioner requesting this information will receive a personalized list of advisors who provide services pertaining the desired financial or legal matter within a reasonable travel distance. We send out lists of five to ten advisors at a time. Please note that the Archdiocese of Toronto does not interview or endorse any advisor on the list. We encourage all those who request information to speak with several advisors to find the right fit for them.

***We will not sell the information you provide.***

***We will not mail you solicitations.***

***We will update your contact information on an annual basis.***

## **CONTACT INFORMATION**

**Advisor's Name**

**Designations /  
Certificates**

**Address**

**Email**

**Webpage**

**Areas of Focus**

(estates, high net  
worth investing, personal  
finance, tax planning etc)

**Practise area**

(city/region)

**Advisor Designation: I am a...**

- Lawyer
- Financial Planner
- Investment Advisor
- Accountant
- Licensed Insurance Agent
- Licensed Securities Agent
- Other \_\_\_\_\_

Please identify services you offer through your practise, program or institution (attach any promotional material you wish) which pertain to estate planning and charitable giving.

**CONTACT WITH OUR OFFICE**

Please let us know how we can best maintain contact with you; how you can help in our work to create gifts to our parishes and charities; and whether or not you consent to participating in annual and directory listings.

- Check here if you would like to receive "Legacy," the personal giving newsletter published by the development office in the Archdiocese of Toronto
- Check here if you would like our Corporate team to contact you about attending our annual golf tournament, Sponsorship, Corporate or Employee giving ( circle one or all )
- Check here if you would be willing to speak at a parish or Archdiocese of Toronto presentation related to your area of expertise
- Check here if you are willing to write an article in your area of expertise for use in Catholic publications, in our churches and online as a resource
- Check here if the Catholic Register newspaper can call you to inquire about advertising in the November "Estates Planning" supplement
- Check here if you do not receive a copy of the Canadian Donor's Guide for Advisors and are interested in receiving a free copy

**BULLETIN ADVERTISING**

Advertising in parish bulletins is an important way to support a local parish as a local businessperson and a Catholic parishioner. The Archdiocese of Toronto wishes to acknowledge these loyal supporters of our parishes by recognizing advertisers on any list we prepare.

For more information on advertising in parish bulletins, please call your local parish or the Church bulletin company, Liturgical Publications at (905) 624-4422.

Do you advertise on a parish bulletin?      Yes  No

**Parish Name (s)**

**This section is optional. You are not required to share this information.**

### **YOUR ACTIVITY AND INVOLVEMENT IN THE TORONTO CATHOLIC COMMUNITY**

This next section will help communicate with you further as a part of our Catholic family of faith.

Also, we will be actively working to help both lay Catholics and Catholic advisors network through external Catholic associations and Archdiocesan events.

*Again, this information will not be published or shared without your expressed consent.*

Your Parish (include all parishes you attend on a regular basis)

Parish Activity / History (Lector, Finance Council, Collection counter etc.)

Catholic Organization/Association Memberships (CWL, Knights of Columbus, etc.)

Catholic volunteer positions (board member/chair of Catholic organizations, institutions or charities)

### **CATHOLIC BUSINESS ASSOCIATIONS / VOLUNTEER OPPORTUNITIES**

**Are you a member of:**

Yes  No

Meritus: The GTA Catholic Business Networking Group

Yes  No

Thomas More Catholic Lawyers Guild

Yes  No

Legatus: International Catholic Business Association

Yes  No

Advisors With Purpose: Christian Advisor Networking group

Yes  No

Canadian Association of Gift Planners: Advisor/Charity Association

**Would you like more information on any of these associations and volunteer opportunities?**

- Meritus Catholic Business Networking Association
- Thomas More Catholic Lawyers Guild
- Legatus
- Advisors With Purpose
- Canadian Association of Gift Planners
- Volunteer opportunities for Catholic Advisors

**Do you know of any other groups we should be aware of and communicating with?**

### **WORKING TOGETHER FOR CATHOLIC PARISHIONERS**

The Archdiocese of Toronto has a “Legacy Society,” which recognizes deferred gifts of any nature to any part of the Archdiocese (parishes, ShareLife, The Shepherds’ Trust, The Seminary, St. Michael’s Choir School, Youth Funds, Masses, Vocations etc.). We are working to ensure all those that have created a gift of this nature are thanked in person or anonymously through your office.

Please help us thank those that have remembered their Church in an estate plan

- I already have clients who have created a gift of this nature and should be recognized for this gift commitment. Please contact me with the appropriate information for me to pass on to them.
- I would like to know more about the Legacy Society and the activity of your office in advance so I can inform my Catholic clients who are in the process of or considering gifts of this nature.

We will send out a basic package with legal titles and all information needed to facilitate gifts when we have received this form from your office.

**Thank you for joining  
the Advisors List of the Archdiocese of Toronto!**

**Please mail or fax this form to:  
Paul Nazareth, Manager of Planned Giving and Personal Gifts  
Archdiocese of Toronto. Development Office  
1155 Yonge Street, 5th Floor Toronto, Ontario M4T 1W2  
Fax 416-934-3412**

Contact Information: 416-934-3411 ext. 561, toll-free at 1-800-263-2595 or  
via e-mail at [pnazareth@archtoronto.org](mailto:pnazareth@archtoronto.org) any time.

**[www.archtoronto.org/development](http://www.archtoronto.org/development)**