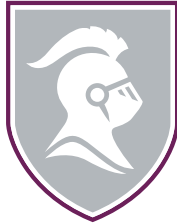


MDRT  
FOUNDATION  
CANADA



2017  
MEMBERSHIP  
NEWSLETTER

WE ARE AGENTS OF CHANGE



*Together we can change the world one good deed at a time*



## AS INSURANCE AND FINANCIAL ADVISORS, WE CAN CHANGE OUR WORLD FOR THE BETTER, ONE GOOD DEED AT A TIME

Once again this year, our membership answered the call to be “agents of change” across Canada, and I have been honoured to be associated with your good works through Million Dollar Roundtable Foundation Canada.

As agents of change you have shown Canadians once again that the Insurance and Financial Advisors industry is comprised of caring individuals who are there not only to help people reach their personal goals for financial security, but also to be leaders within their communities when it comes to helping those less fortunate.

Every act of kindness has a ripple effect. In 2016 we again helped change the world for the better, one good deed at a time.

We also embarked on many different charitable avenues compared to previous years; some familiar, and some new.

In our first ever Promise Appeal campaign, we worked in conjunction with our MDRT Foundation brothers and sisters south of the border, and amplified the life-changing gift we could all give together. Through our combined efforts in support of the Mercy Ships organization, we brought desperately needed medical care directly to those suffering at ports of call throughout the world.

Because of you and everyone else who donated to the Foundation last year, we were once again able to raise the visibility of our membership in the communities where we live and work.

As it is often said, “we give where we live,” and so it follows that when you “let us help you, help them,” the hard-earned money that you have set aside for charity works a little harder. It not only helps those in need today, but your good deeds and helpful nature are remembered long after the charity has benefited.... which is also good for business down the road.

Our 5th Annual Valentines Silent Auction was once again chock full of generous gifts to the Foundation, which we could turn into funds for helping others. This is one of our most effective fund-raising events, and I encourage our members to continue to grow this event through their donations and through their bids on the auction items.

Our 7th Annual Christmas Campaign was likewise very successful this year. As we hope for more kindness and tolerance in an uncertain world, it is during this time of year that our hearts are especially touched.

I look forward to the coming year with great excitement for the future of the Foundation. With your help, we just keep getting better and better at helping others. I hope to share my passion for granting hope with as many members as possible this year, and I hope to see you visiting our new Facebook page to share your uplifting stories, and read about the charities across Canada that you continue to help through your generous gifts to MDRT Foundation Canada.

**Alphonso Franco RHU, RCIS**  
**Victoria, BC**  
*President, MDRTF Foundation Canada*



# SOME HEROES HELP SAVE THE WORLD WITH NO SPECIAL POWERS WE ARE AGENTS OF CHANGE



**Beth Lachance-Hesson CLU, CFP, CEBS**  
*RBL Financial  
Midhurst, ON  
MDRT Foundation Canada Member*

**Donation to DeafBlind  
Ontario Services**





## "WHEN YOU'RE ABLE TO INCORPORATE CHARITABLE GIVING INTO YOUR PRACTICE, IT CAN MAKE THE SUCCESSES THAT MUCH GREATER."

At Capital Core Financial, there are two simple mandates, provide the highest level of client services, and to give back to the community. Franco Caligiuri, President of CCF and MDRT member, has always been a champion of charities around the world and in 2016 he decided to change his charitable focus on to his back yard.

"As financial advisors, it is easy to focus on the business, but when you are able to incorporate charitable giving into your practice, it can make the successes even that much greater. It just feels so good knowing the change that is happening in your community". -Franco Caligiuri

In Vancouver, poverty is an issue that many have become accustomed to and usually turn a blind eye.

Nobody should ever have to ask the question "Where does my next meal come from?"

Unfortunately, many Canadians have to face this question every day. And when you're hungry, it's hard to focus on anything else — wellness, housing or making big life decisions.

Founded in 2012 by Mark Brand, 'A Better Life Foundation' (ABLF) strives to support people in need. The overarching goal of the Foundation is to raise critical funds towards providing food security to women, children, and those in assisted living as well as provide job training and employment opportunities for the community at large. By looking for and working towards sustainable solutions, ABLF aims to contribute towards meaningful change.

This holiday season, ABLF raised \$138,386 which provided 39,567 meals for their "Being Hungry Sucks" campaign for people living in the Vancouver Downtown East Side. This area, one of the city's oldest, is notorious for its open-air drug trade, sex work, and high rates of poverty, mental illness, infectious disease, and crime. It is also known for its strong

community resilience and history of social activism.

Gloria and Rick's stories are some of thousands of people, in similar situations who rely on the meals provided by A Better Life Foundation and thanks to donations from YOU.

The 2016 recipient of the CMDRT Grant, A Better Life Foundation, was presented with a cheque for \$5,000 on December 19th 2016 by a proud member of MDRT Foundation Canada, Franco Caligiuri, Co-Founder of Capital Core Financial. This provided 2000 hot meals to residents of the Downtown Eastside during one of the coldest winters in Vancouver in decades.

**Franco Caligiuri CHS**  
*President, Capital Core Financial*  
**Vancouver, BC**  
*MDRT Foundation Canada Member*



"Some medication you have to take food with, you know, it's important for us to take our meds right and if you can't take your meds it's not good." ... "I think my mental outlook is better, knowing that I don't have to worry everyday where I'm going to get something to eat. I sleep better, just all around better. Like it's supposed to be."  
- Gloria



"Thank god for you guys! Because I have one meal a day, basically I'm not going to lie, that gets me through the day, but if I miss it, I'm screwed. Without that one meal a day it would be really hard to make it." - Rick



Donation to  
A Better Life  
Foundation





## "BEING CHARITABLE BOTH FINANCIALLY AND WITH MY TIME, HAS BEEN GOOD FOR ME PERSONALLY, AND HAS ALSO HELPED TO BUILD MY CORPORATE IMAGE AND BRANDING."

Giving back to your community is part of my life. Past generations of my family have supported many causes, both financially and with their time. My early recognition of the role of a volunteer was my grandfather, Wilfred James- my dad's father who was the chair of the Board that raised funds and supervised the construction of CNIB's camp on Lake Joe in 1960.

My great aunt was also part of the Lake Joe committee and was instrumental in the establishment of the CNIB Fragrant Garden, a sensory garden located at CNIB's Bayview Avenue offices in Toronto. My mother read university textbooks to cassette tapes for blind students and volunteered as a Vision Mate to assist a blind woman with banking and shopping. My parents were active volunteers in their church and our schools in Toronto.

Volunteering and being charitable is part of my upbringing and my way of life.

I AM A FIRM BELIEVER IN OUR DUTY TO GIVE BACK TO OTHERS. I BELIEVE IN THE SAYING "YOU GET WHAT YOU GIVE."

In Kingston, I Ontario I have had the opportunity and privilege to build a successful life insurance and investment business.

I have volunteered time to numerous organizations that I have had a sincere, personal interest in or connection to. I have served on numerous boards and committees with Frontenac Children's Aid Society, Kingston General Hospital, Limestone Learning Foundation, Canadian MDRT Foundation, KGH Black Tie



Gala Fundraisers and Chaired Rose of Hope Charity Golf Tournament for 5+ years. This event has raised over \$400,000 in 4 years for a chemotherapy suite at Southeastern Ontario's Cancer Centre. I have volunteered teaching a business program for 20 years in the public schools and helped in many galas and golf tournaments to raise money for many local causes.

Currently I chair the capital campaign for the University Hospitals Kingston Foundation, which in the 3rd year of our 5 year campaign, we have raised over 52.5 million dollars. Our goal is 65 million dollars.

Being charitable both financially and with my time has been good for me personally and has also helped to build my corporate image and branding. I have met people I might not have met and have built business relationships that stemmed from my community service. My late first husband David Creasy said, "You don't see a Brinks truck in a funeral procession!" I think of how fortunate we are and how much our firm and I can make a difference in the community we live in. Giving is a pleasure, not a chore! Please give generously of your time and money to the causes that are important to you. There is an old saying, "what goes around comes around." I believe that applies to those being philanthropic



**Susan Creasy CLU, B.P.H.E., B.Ed**  
*Susan Creasy Financial*  
**Kingston, ON**  
*MDRT Foundation Canada Member*



MDRT Foundation  
Canada  
Donated to  
Hope Haven  
Therapeutic  
Riding Centre  
this year



# WHEN WE HELP THEM SECURE THEIR TOMORROWS, WE ARE BEING A MENTOR, AND THE BENEFITS YOU RECEIVE FAR OUTWEIGH THE TIME AND EFFORT YOU PUT IN.

In June 2016, I had the privilege of speaking at the MDRT Connection Zone on the value of a mentor. At the core of what we do is mentoring and MDRT embodies the practice of mentoring.

There are three types of mentors and we should strive not only have them, but to be them. Some would call them "Paul" "Barnabas" and "Timothy". We were all created to be in community with one another, to help each other and to learn from each other. We don't often think of it as "mentoring", but that is what we do every day.

"Paul" is a mentor who is older, more experienced, someone we can look up to, who has walked the journey before us. There are so many people within MDRT who are more than willing to share ideas and concepts with advisors new to the business. Take advantage of those people, learn from them and put into practice what they tell you to do. Learn from the masters.

"Barnabas" is a peer, one who walks beside us, who challenges us to be the best we can be. Get involved in a study group, share ideas, challenge one another, and hold each other accountable. Encourage each other to attend MDRT every year and get involved meeting new people.

"Timothy" is someone who helps those who are new in the business, someone younger and inexperienced, and gives them the knowledge and experience that they haven't learned yet. Find a new advisor in your organization or company and meet with them on a regular business to encourage them and help them to stay on track. Show them the things you've learned over the years that have helped make you the success you are today.

MDRT HAS SO MANY RESOURCES AVAILABLE WHEN IT COMES TO MENTORING. THERE IS A SPECIFIC MENTOR / MENTEE PROGRAM, VIDEO RESOURCES, BOOKS AND WEB SITE.

Visit the book store and ask people what their favourite author or book is. There are an unlimited number of available ways to be a mentor and to be mentored.

Our job, ultimately, is to be a mentor to our clients. We need to help them navigate the process of dying too soon, living too long or being disabled along the way.

When we sit with our clients and help them to secure their tomorrows, we are being a mentor. Often, you will find that when you reach out to help and mentor someone, the benefits you receive far outweigh the time and effort you put in.

It is, after all, "more blessed to give than to receive". So go and be a mentor today!



**Heather Meszaros CHS**  
*Tomorrow Financial Services Inc.*  
*SunLife Financial*  
**High River, AB**  
*MDRT Foundation Canada Member*



**Scott Grant EPC**  
*Ridge Planning Group*  
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*CustomPlan Financial Advisors*  
*Adamek Financial Services*  
**Vancouver/Victoria, BC**  
*MDRT Foundation Canada Member*  
*Life and Qualifying Member MDRT*

**Donation to Langley Lodge Seniors Care Music Program**

"AS A COLLECTIVE GROUP, OUR TRUE POWER IS MEASURED BY HOW MANY OTHERS WE CAN LIFT."



# PICK A CAUSE, APPLY FOR A GRANT

This is a big part of what makes MDRT Foundation Canada so special. Our members directly select worthwhile grassroots charities within their communities across Canada, apply for a grant, and these become the charities your Foundation focuses on.

There is nothing like the feeling of showing up at the charity's door with a cheque in your hand. The gratitude is real. The memory is



long. And should someone connected to the charity need financial advice there is a good chance they will turn to you. The need is great. Some of our Knights uncover very worthwhile charities that may not have reached the size or status of a federally funded charity.

Make this year your "Grant Year" and create your legacy of hope and change for a better tomorrow.

## FINANCIAL AND INSURANCE ADVISOR "AGENTS OF CHANGE" ARE HEROES: WORKING TOGETHER TO CHANGE THE WORLD, ONE GOOD DEED AT A TIME

You don't need a cape, to be a super hero.

Our members are "Agents of Change" who help make the world a better place, and the only special power they need is their ability to care.

I see this power in the kindness and generosity of MDRT Foundation Canada members when I interact with them, and when they respond to our fundraising campaigns throughout the year. I also see it in those of you who identify a deserving charity in your local community and apply for a grant.

Every small or large act of kindness has far-reaching effects. It begins a wave of good will.

Each day I am humbled and privileged to serve the MDRT Foundation Canada Membership's caring spirit. Though our collective action of giving across Canada we offer our chosen charities strength and hope to carry on with their good works.

This has been another year of growth at your Foundation. We have more people coming to our website and donating online, we have launched social media efforts (please visit our Facebook page!).

As technology continues to have an impact on the way

insurance and financial service professionals serve their clients, more than ever before I see our members appreciating the the important role the Foundation can play in their business.

MDRT Foundation Canada is working hard to make a difference in the lives of those less fortunate, and with every grant, and every event, the professional image of our industry is also lifted.

I would like to thank our dedicated Board of Directors who give up their valuable time in service of others. They truly reflect the caring spirit of MDRT Foundation Canada. You inspire me, and I am grateful for your constant support and advice.

I look forward to seeing everyone in Orlando Florida for our MDRT Annual Meeting. Come enjoy the companionship and business-growing knowledge of other MDRT members.

Thank you all for making MDRT Foundation Canada What it is Today and What it will Be Tomorrow!!

**Joanne E. Taylor**  
*Executive Director*  
*MDRT Foundation Canada*



## OUR 2016 GRANT RECIPIENTS

| ORGANIZATION                         | AMOUNT     | KNIGHT SPONSOR                  |
|--------------------------------------|------------|---------------------------------|
| A Better Life Foundation             | \$5,000.00 | Franco Caliguiri BC             |
| Bata Shoes Step Ahead Program        | \$5,000.00 | Bruce Etherington ON            |
| Colts Cricket Club                   | \$7,500.00 | Alphonso Franco BC              |
| CNIB Simcoe Muskoka                  | \$7,500.00 | Peter Nicholson ON              |
| Community Reach                      | \$2,000.00 | Tyler Burtch ON                 |
| DeafBlind Ontario Services           | \$2,000.00 | Beth LaChance-Hesson ON         |
| Hope Haven                           | \$5,000.00 | Susan Creasy ON                 |
| Kindred Spirits                      | \$2,000.00 | Alan Dorfman ON                 |
| Langley Care Foundation              | \$2,000.00 | Scott Grant BC                  |
| Make-A-Wish Southwestern Ontario     | \$2,000.00 | David Rounthwaite ON            |
| Peer Meditation and Skills Training  | \$5,000.00 | Richard Lee AB                  |
| Saint James Music Academy            | \$2,000.00 | Pat McGuire BC                  |
| Victoria General Hospital Foundation | \$2,000.00 | Pierre Campeau MB               |
| Mercy Ships                          | \$7,000.00 | on behalf of all MDRTFC members |



# THERE ARE SO MANY WAYS TO GIVE TO YOUR FOUNDATION

Our deepest gratitude goes out to our volunteers who make the calls at our Annual Phone-A-Thon. It's the perfect way for you to get involved, meet fellow members and have two days, or two hours of fun for a very worthy cause.



In the spirit of giving that we all experience over the holiday season, it's nice to know we can always count on our membership to dig a little deeper, and help contribute to elevate those in need.



Our 5th Annual Online Valentine's Silent Auction grew in popularity this year, supported by an email campaign that went out to our membership, inviting them to bid.

There's no better Valentine's gift for your loved one than a gift where the purchase also shows your love for your fellow human being.

Please call our Executive Director at 1-800-563-5822 ext 9878 to get involved in any of these initiatives.

Another way to give, is to give of your time and visit our newly launched Facebook page. The more our members get involved the better.



## MAKE A GIFT ONLINE @ CMDRTFOUNDATION.ORG

You want to contribute, and give your life more meaning.

But you simply don't know anyone at a deserving charity, and don't have the time to research one.

As a contributing Knight, you can take comfort in knowing that your Foundation Board also responds to international disasters and other worthy causes by sending money on behalf of all members.



### There are 3 ways you can participate online:

DONATE ANY TIME.

With our PayPal secured online transactions you can make a donation with your credit card anytime for almost any amount.

SET UP A RECURRING DONATION.

You won't even miss the money each month!

MAKE A TRIBUTE GIFT

in honour of someone you love.



## Small stars shine the brightest...

Give Kids the World Village, is a 79-acre, nonprofit resort in Central Florida that provides week-long vacations to children with life-threatening illnesses. Your suggested minimum donation is \$200. Each donation will be divided evenly between Give Kids The World Village and MDRT Foundation Canada. Visit [cmdrtfoundation.org/givekids.html](http://cmdrtfoundation.org/givekids.html) to make a secure online donation or call 1-800-563-5822 ext. 9878.

Canadian tax deductible if you donate before May 28th

551 Canadian families served last year



# SEE YOU THERE







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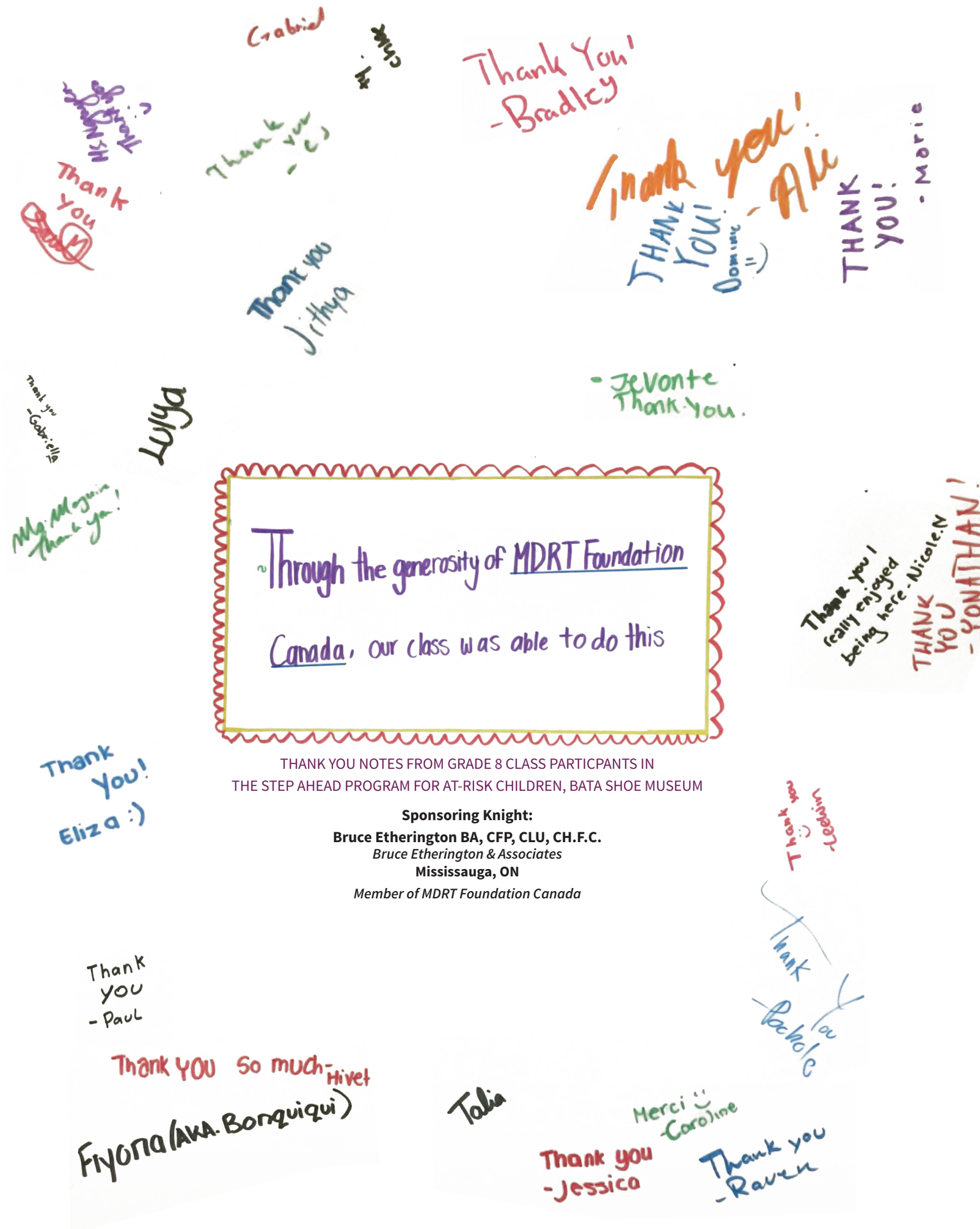
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MDRT Foundation  
Service Project 2016

Building a much needed  
playground





great thanks  
to our friends at Advocis  
for providing us with our wonderful office space.



Many of our knights are unaware of how much MDRT Foundation Canada relies on the wonderful generosity of Advocis. They provide us with our office space and a gracious helping hand. We are so appreciative of the ongoing support.

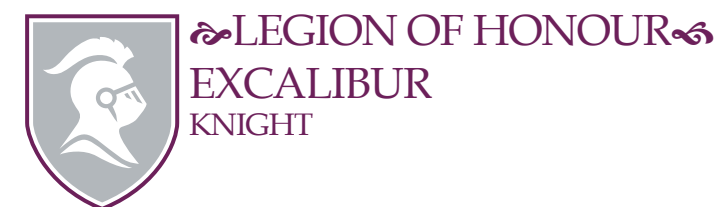


Lifetime contribution of \$250,000 or more



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Lifetime contribution of \$3,000 to \$4,999



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