

ABOUT THE AUTHORS

Jack Bergmans

As a founding partner of Bequest Insurance, Jack is one of Canada's leading experts in integrating insurance into financial, estate and legacy planning. Jack is a Certified Financial Planner and has been in the investment industry since 1996. As a licensed insurance broker, he works with individuals and organizations providing independent financial, investment and retirement advice, and is also an estate planning and legacy giving specialist. Jack has previously worked in various financial planning roles with Manulife Financial, BMO Nesbitt Burns and Altamira Financial Services. Jack can also be found on a golf course, tennis court or bowling alley, and putting to good use his creative culinary talents cooking for his wife Marlena McCarthy and their friends.

Marlena McCarthy

Marlena McCarthy has worked with charities since 1982 in marketing, communications and fundraising. As Founding Partner and Fundraising and Communications Director of Bequest Insurance (www.bequestinsurance.ca), Marlena works with charities to help create income streams from gifts of life insurance and insurance products by creating simple yet gripping promotional materials. Through her Done Write Communications business (www.donewrite.com), Marlena acts as a fundraising consultant and writer for non-profits, specializing in planned giving promotion, direct mail fundraising, mid-level donor programs, and donor communications materials. In her spare time, she loves singing with her a cappella quartet Spadina Station, and chumming around with her husband, Jack Bergmans.