

## Gena Rotstein, MA, FEA

Philanthropy Strategist • Family Enterprise Advisor • Social Impact Entrepreneur



### Short Bio

Gena Rotstein is a recognized leader in social enterprise, philanthropy, and family enterprise advising. As Co-Founder of Karma & Cents, she works with multi-generational families, family offices, and financial institutions on impact-driven legacy and philanthropy strategies, advising on over \$1B in philanthropic assets. She previously founded Dexterity Ventures Inc., which built North America's largest charity search engine, and the Place2Give Foundation, a cross-border Donor Advised Fund. A sought-after speaker and educator her thought leadership has been featured in *Stanford Social Innovation Review*, *Globe & Mail*, *CBC*, and *Financial Post*. Gena is an engaging speaker at global conferences including TEDx, Advisors in Philanthropy, CAGP, and the Purposeful Planning Institute.

### Full Bio

Gena Rotstein, MA, FEA, is one of Canada's leading voices in social enterprise, philanthropy, and family enterprise advising. A serial entrepreneur, she founded Dexterity Ventures Inc., home to North America's largest charity search engine which she sold in 2016. She is also the Founder and Board Chair of the Place2Give Foundation, a cross-border Donor Advised Fund. In 2017 she co-founded **Karma & Cents**, a social impact lab working with multi-generational family businesses, family foundations, and offices to design impact-driven philanthropy and legacy plans. Today, Karma & Cents advises on over **\$1B in philanthropic capital** and leads innovative initiatives such as Indigenous Philanthropy Advising, the YYC Food Security Fund, and the Converge Mental Health Coalition.

Gena is a frequent media commentator (*CBC*, *BNN*, *Globe & Mail*, *Financial Post*) and contributor to publications including *Stanford Social Innovation Review*. She has spoken at global platforms including TEDx, Advisors in Philanthropy, CAGP, and the Purposeful Planning Institute. An active community builder, Gena also serves as trustee and advisor to multiple foundations and non-profits.

In her spare time Gena is a long-distance cyclist. Gena lives in Canada and Germany.

### Speaking Topics

- ✓ Philanthropy & Impact Investing for Family Offices
- ✓ Next-Gen Legacy Planning & Wealth Transfer
- ✓ Trust-Based & Indigenous-Informed Philanthropy
- ✓ Building Cross-Sector Collaborations
- ✓ Systems Thinking for Family Enterprises

### Contact

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