24th ANNUAL
NATIONAL CONFERENCE

CAGP 2017 CANADA 150

A Better World through Strategic Giving

MARCH 29-31

The Hilton Toronto Hotel

Canada's only conference that specializes in strategic charitable gift planning




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The organizations listed were confirmed at time of publication.

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A Better World through Strategic Giving

TONY LEE MBA, CFRE

Chair, Host Advisory Committee

WELCOME!

Thank you for choosing to attend the CAGP National Conference in 2017. I know there are a lot of good fundraising conferences, so it is a real honour that you chose us. I want to make sure that it will be worth the commitment and effort you have shown to get here.

At this year's CAGP conference, come with us as we discover new strategies, delve into advanced learning, meet like-minded professionals and share personal and professional experiences and aspirations.

With dynamic educational sessions, networking and social events, the 2017 CAGP Conference promises to offer more opportunities than ever to develop an invaluable network of contacts and be inspired to share and motivate our teams, our donors and ourselves.

Whether you are a new or seasoned fundraiser, professional advisor, board member or financial officer of a charity, this conference will provide opportunities at all levels to come together to create a better world through strategic giving.

It is my hope to meet and greet each one of you individually. Please feel free to stop me at any time to say 'hello' and let me know how the conference is going for you.

2017 Host Advisory Committee

Committee Chair

Tony Lee MBA, CFRE	Canadian Cancer Society

Committee Members

Cynthia Collantes	St. Michael's Hospital
Emelita Ervin	Humber College Institute of Technology & Advanced Learning
Aneil Gokhale	Toronto Foundation
Anne Gorwill	Consultant
Serena Hak	The Donor Motivation Program®
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Lori Sussman	Heart and Stroke Foundation Canada
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Marcella Zanella	The Nature Conservancy of Canada

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Committee Chair

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Committee members

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Denise Fernandes	SickKids Foundation
Ryan Fraser CFP	Quiet Legacy Planning Group
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Ruth MacKenzie	Canadian Association of Gift Planners
Jill Nelson, CFRE	The Princess Margaret Hospital Foundation
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Doug Puffer	Carleton University
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Tina Tehranchian CFP, CLU, CHFC	The Donor Motivation Program®

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OUR CONFERENCE PROMISE

Advanced Learning

New Strategies

Strong Networking

WHO SHOULD ATTEND?

Professionals in Charities

Development officers/managers, board members, senior staff, executive directors, fundraisers, major gift officers, finance and trust officers

Professional Advisors

Financial planners, lawyers, accountants, insurance specialists, estate planners and consultants who advise charities and Canadians

Conference Schedule

AT-A-GLANCE

Conference Location and Accommodation
Hilton Toronto Hotel
145 Richmond St. W.

TUESDAY MARCH 28	
7:30 – 5:00	Gift Planning Fundamentals
7:30 – 5:00	Bequest Management for Charities: A Primer on Estate Administration
3:00 – 6:00	Conference registration open
WEDNESDAY MARCH 29	
7:00	Registration open / Breakfast
8:00 – 9:00	Opening Plenary session *Speaker: Bruce MacDonald, Imagine Canada*
9:15 – 10:45	Education sessions
10:45 – 11:15	Refreshment break in Exhibit Hall
11:15 – 12:15	Education sessions
12:30 – 2:00	Lunch and Table Talk Discussions
2:15 – 3:15	Education sessions
3:15 – 4:30	Welcome Reception in the Exhibit Hall
6:30	Optional Social Activity - Dine Around or Raptors Game and Dinner
THURSDAY MARCH 30	
7:00	Registration opens / Breakfast
8:00 – 9:00	Plenary session *Speaker: Lorna Somers, McMaster University*
9:15 – 10:45	Education sessions
10:45 – 11:15	Refreshment break in the Exhibit Hall
11:15 – 12:15	Education sessions
12:30 – 1:30	Lunch and CAGP AGM
1:30 – 2:30	Dessert in the Exhibit Hall
2:30 – 4:00	FRANK Talks Plenary session
6:00 – 11:00	CAGP Reception and Banquet
FRIDAY MARCH 31	
7:00	Registration opens / Breakfast
8:00 – 9:00	Plenary session *Women & Philanthropic Trends Panel*
9:15 – 10:45	Education sessions
10:45 – 11:15	Refreshment break in the Exhibit Hall
11:15 – 12:15	Education sessions
12:30 – 2:15	Lunch and Closing Plenary *Speaker: Don Tapscott C.M., The Tapscott Group*
3:00	Optional Social Activity – Ripley's Aquarium Tour

Please note: speakers and program are subject to change.

PLENARY SESSIONS

Bruce MacDonald

Wednesday March 29 8:00 a.m.

5 Wicked Questions

Bruce MacDonald,
Imagine Canada

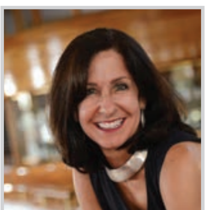
Tough to answer. Yes or No just won't do it. Paradoxes and tension abound. Join Bruce as he kicks off the conference with a mind-teasing exploration of some of the key issues facing the social good industry and accept his invitation to be frustrated. From challenging widely held viewpoints, to questioning data, this opening will likely be measured by the amount of chatter created at the coffee break!

Sponsored by: RBC Wealth Management PH&N Investment Counsel

Wednesday March 29 12:30 p.m.

Table Talk Discussions

Join us for an informal lunch while you share ideas, perspectives, news and views with like-minded colleagues on a variety of planned giving topics.



Lorna Somers

Thursday March 30 8:00 a.m.

Voyages of Discovery

Lorna Somers,
McMaster University

We each have within us the ability to be pioneers and leaders within our organization and our profession. It is no small feat, however, to be a catalyst for change and map an ambitious course of action for our programmes when the environment around us is in a state of flux. It takes a new way of thinking about what we do, how we do it and how we can best serve our many constituencies. Join Lorna on a Voyage of Discovery to see the opportunities around us with new eyes and inspire us to position ourselves and our institutions for success!

Sponsored by: Carters Barristers · Solicitors Trademark Agents; Fasken Martineau

Thursday March 30 12:30 p.m.

CAGP Annual General Meeting

Don't miss CAGP's Annual General Meeting! Hear from the Board Chair and President & CEO on highlights of the last year, elect new national Board members and receive the 2016 auditor's report. As members, this is your opportunity to engage and ask questions on issues pertinent to you.

Thursday March 30 2:30 p.m.

FRANK Talks

A TED Talk style event, FRANK Talks acknowledges CAGP's guru Frank Minton as a leader in gift planning education. Using the theme for the Talks, Creating the New Model, FRANK Talk speakers have been granted the power to create the perfect Canadian charitable organization whose sole mandate is to 'help people create a better world'; and– in 7 minutes – they will explain why this would be the ideal organizational model.

Sponsored by: Miller Thomson Avocats | Lawyers

Friday March 31 8:00 a.m.

Women & Philanthropic Trends Panel

As women's influence over wealth in Canada continues to rise, their distinct approach to giving needs to be better understood by charities. Our dynamic panelists will explore the unique factors motivating and influencing women's philanthropic decisions in today's world –with concrete examples of what your organization can do to capitalize on women's growing economic power and their unique approach to giving. This discussion will tie in TD's ongoing research on women and philanthropy combined with perspectives from influential women donors and philanthropic leaders.

Moderator: Marnie A. Spears C.Dir, KCI

Panelists: Bonnie Shepherd, UNICEF Canada; Jo-Anne Ryan, TD; Kelly Meighen, T.R. Meighen Family Foundation

Sponsored by: TD

Don Tapscott

Friday March 31 12:30 p.m.

Philanthropy in the Second Era of the Internet

Don Tapscott C.M.,
The Tapscott Group

As we enter the networked age, philanthropy is going through a profound change. This has big implications for fundraisers and donors alike. Because of a number of factors, most notably the Internet's slashing of transaction and collaboration costs, charities can now build deep relationships with philanthropists. One result is that donors can become more deeply engaged with causes. All parties become part of a network and can therefore view themselves differently. Donors become more like investors in social innovation, and are looking for a return on their investment. Charities can be participants in complete networks for solving problems, with more sustainable funding. Most importantly, the Internet is entering a second age based on Blockchain — the underlying technology of crypto currencies like Bitcoin. This has huge implications for philanthropists!

Sponsored by: BMO Wealth Management BMO Private Banking

Want a better way to promote legacy gifts?

LawDepot, an international DIY legal form provider based in Edmonton, AB, wants to help you to encourage more Canadians to get their affairs in order and leave behind a gift to a cause that means something to them.

45%
of Canadians have create a Last Will and Testament

7%
of those have left a gift to a charity in their estate plans

We made it easy for users in any Canadian province to add a charitable gift to their Last Will and Testament by creating a new section in our Last Will questionnaire which allows them to choose whether to leave behind a simple monetary gift, or the residue of their estate.

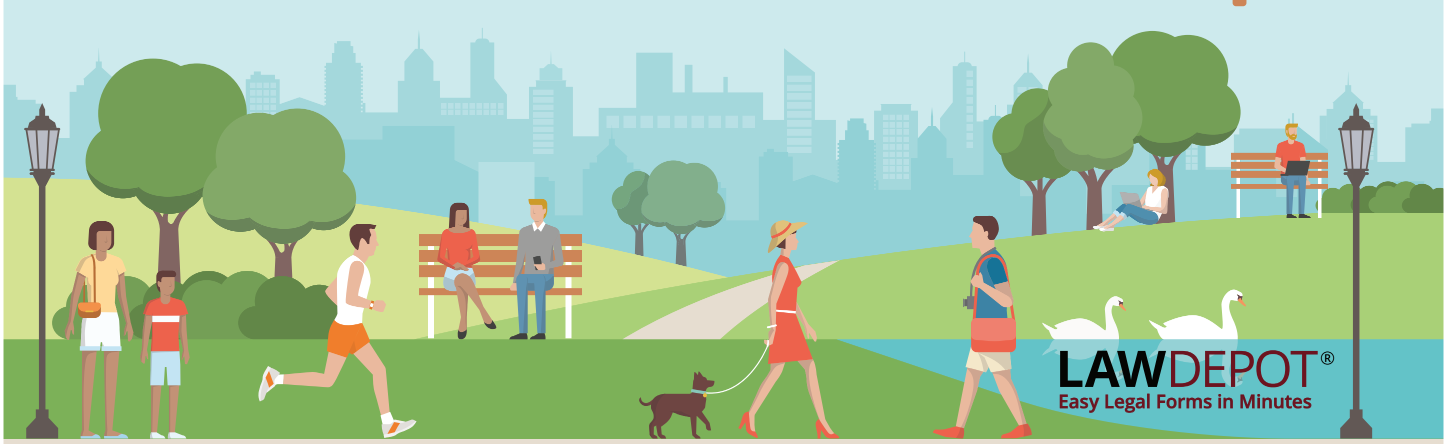
This partnership is **free** for any charities who wish to be involved!

If you're interested in learning how LawDepot can help you to make planned giving easier, please contact:

Narissa Ramji
Business Development Associate

Brittany Foster
Marketing Coordinator

Email: charity@lawdepot.com
Phone: 1 (587) 525-5932
Web: www.lawdepot.com



SESSION TOPIC STREAMS

Topic streams enable you to streamline your session choices and ensure your conference education covers the gift planning bases.

Gift Planning Essentials

Sessions that deliver knowledge and concepts fundamental for gift planners who are new to the profession or seeking a refresher on a certain topic.

Skills & Competencies

Successful gift planners and advisors require a broad range of knowledge and expertise to manage a complex array of tasks. These sessions focus on the development of professional skills that will maximize performance and optimize impact.

Managing A Gift Planning Program

Strategic charitable gift planning often brings unique opportunities and challenges. These sessions will enable delegates to proactively tackle challenges and pursue opportunities to manage gift planning programs with excellence.

Communications & Marketing

These sessions introduce delegates to the newest and greatest ideas to develop and distribute targeted gift planning marketing and communications collateral across multi-media platforms.

Donor/Client Relations

Sessions that explore the art of being truly donor/client-centred, as experienced professionals share strategies and tactics for building an authentic rapport with donors and clients that will evolve relationships from the transactional to transformational.

Governance/ Finance

Philanthropists are becoming increasingly involved and savvy, and estates are becoming more complex, making a sound understanding of governance and financial matters integral to success. These sessions reach beyond gift and estate planning to the broader spectrum of charity management and oversight.

Technical Expertise

Sponsored by:
CIBC Wealth Management

These sessions will help professionals hone their technical knowledge and sharpen their expertise to support donors/ clients along their philanthropic journey, and manage their gift planning program or practice with confidence and competence.

Master Class Series

Sponsored by:
TORONTO FOUNDATION

Created for participants of all skill levels, these sessions allow experts in a chosen field to delve deep into the topic. Informal, small classroom sessions will provide a combination of technical and practical information. All participants should come prepared to engage in a variety of activities over a 2.5-hour session. Designed to challenge and be interactive, participants will 'master' core concepts by applying them to real-life, work-related situations.

The 2017 Master Class Series will feature the following topics:
• High Net Worth Donors – No one size fits all!
• Behavioural Economics – Getting Inside the Mind of Your Donor
• Managing a Gift Planning Portfolio – Best Practices
• Having the Donor Conversation

EDUCATION SPONSOR

THE DONOR MOTIVATION PROGRAM®
We Motivate Planned Giving!

EDUCATION SESSIONS

TUESDAY MARCH 28

PRE-CONFERENCE SESSIONS 7:30 – 5:00

Gift Planning Fundamentals

Sponsored by: The Offord Group

Whether someone new to gift planning or you are in need of a solid refresher, *Gift Planning Fundamentals* is a one-day introductory course that reviews Canadian trends and tax issues, common gifts in Canada, and concludes with marketing, stewardship and discussing planned gifts with donors.

Alain Lévesque, DeVimy & Associates Inc; Janice Loomer Margolis, JLM Philanthropy

2017 CFRE Approved Provider for Continuing Education

This course is applicable for 8.0 CFRE Credits

The Institute for Advanced Financial Education

Institute accredited CE (8.0 credits)

Bequest Management for Charities: A Primer on Estate Administration

Sponsored by: The Offord Group

Jasmine Sweatman literally "wrote the book" to help charities understand their rights and responsibilities in accepting gifts from estates and protecting their interests. In this full day course, Jasmine and Jill will guide you through the legal and practical realities of making it work in your busy charity. Look forward to lively discussion as we work on real cases and provide tips, and protocols for you to take back to whip your bequest management program into shape. Whether your responsibilities lie in gift planning, finance, governance or legal, you will benefit from this intensive day with two experienced practitioners.

Note: The focus will be on Common Law jurisdictions

Jill Nelson CFRE, The Princess Margaret Cancer Foundation; M. Jasmine Sweatman LL.M., LL.B., Sweatman Law

WEDNESDAY MARCH 29

PLENARY SESSION 8:00-9:00

5 Wicked Questions

Bruce MacDonald, Imagine Canada

EDUCATION SESSIONS 9:15-10:45

MASTER CLASS ★

High Net Worth Donors – No one size fits all! (2.5 hour session)

Sponsored by: Toronto Foundation

This Master Class will examine three real-life case studies faced by senior gift planning professionals that involve significant and innovative gifts. The discussions around the case studies will look at practical and technical aspects of accepting a complex gift. Discussions will include tax, valuations, acceptance policies, documentation, capacity of elderly donors, gifts of securities and life insurance. In our discussions, we will also consider best practices when working with professional advisors and provide an overview of effective strategies to employ when dealing with high net worth donors.

Silvia Ugolini, Concordia University; Jo-Anne Ryan, TD

MASTER CLASS ★

Behavioural Economics: Getting Inside the Mind of Your Donor (2.5 hour session)

Sponsored by: Toronto Foundation

The language, images, colours, and structure we use in our gift planning programs can dramatically influence the outcome of decision-making. Taking a deep dive into the principles of behavioral economics, Leah and Scott will provide specific tools and methods you can use to lead donors and clients to the action you want them to take. Whether professional advisor, or planned giving professional, attendees will come out of this highly interactive session with a new way of looking at their work.

Leah Eustace ACFRE, Good Works; Scott Fortnum, The Living City Foundation

Loved the diversity of speakers and especially the FRANK Talks with bright minds and powerful, thought-provoking messages. - Deborah Barton, Children's Health Foundation

GIFT PLANNING ESSENTIALS

Introductory

Gift Planning Overview

This session is designed to give a high level and broad overview of gift planning to those new to the field. We will discuss differences between planned giving and other modes of fundraising as well as give you the key terminology and basic understanding necessary to make the most of other sessions that follow during the conference. We will arm you with practical ideas and resources to jumpstart your understanding of planned and strategic giving.

Ryan Fraser CFP, Quiet Legacy Planning Group; Paul Nazareth, CanadaHelps

TECHNICAL EXPERTISE

Advanced

The Good, the Bad & the Ugly

What makes a successful planned gift? And where do they go wrong? This interactive session will explore five planned gift case studies: three success stories and two that didn't quite go as intended. Drawn from the practices of two of Canada's most experienced practitioners, the studies explore the interaction of high-net worth donors, multi-layered technical issues and the delicate relationship of donor and charity. Names and details have been changed to protect the innocent.

Malcolm Burrows, Scotia Wealth Management;
M. Elena Hoffstein LL.B., Fasken Martineau DuMoulin LLP

GIFT PLANNING ESSENTIALS

General

Using Your Size to Your Advantage

Whether you are a large organization or small, there are many opportunities in planned giving. Too often people in small shops focus only on the limits. In this very interactive session, we will show you how to optimize the advantages of being a fundraiser in a small shop. Based on our direct experience in organizations as small as one staff person, we will give you concrete tips for maximizing your success and time effectively.

Mimosa Kabir, War Child Canada; Ann Rosenfield MBA CFRE, Charitably Speaking

GIFT PLANNING ESSENTIALS

General

Estate Administration Fundamentals

Ever wonder what probate is, how to know if estate accounts are appropriate, when to approve accounts (or not), what a release is and why you need to sign it? How to voice concerns with tact and professionalism? This session will answer these questions and more as you learn how to administer an estate, when to question the executors, what are your rights & obligations and where do you fit in as the charity's representative.

Colleen DeJager TEP, London Health Sciences Foundation

WEDNESDAY MARCH 29

EDUCATION SESSIONS 11:15-12:15

MASTER CLASS

High Net Worth Donors – No one size fits all!

Continued

MASTER CLASS

Behavioural Economics: Getting Inside the Mind of Your Donor *Continued*

GIFT PLANNING ESSENTIALS

Introductory

Integrating Life Insurance Gifts in a Successful Gift Planning Program

Many new gift planners think that gifts of insurance are "too complicated" and focus on seeking lower-hanging fruit - gifts in the will. This workshop will expand your fundraiser's toolkit by demystify giving through life insurance and other insurance products. You'll learn the benefits of giving through insurance that delight donors, including using the multiplying power of insurance to give much larger legacy gifts than they may otherwise be able to give.

Jack Bergmans and Marlena McCarthy, Bequest Insurance; Laura Mullin, Canadian Cancer Society

Each session provided me with enriching information that will help me become a successful gift planner. - Cheryl Gipson, BC Cancer Foundation

TECHNICAL EXPERTISE

Advanced

How to Document a Gift

While there is no legal requirement for gifts to be documented in writing, failure to properly document a gift can lead to all kinds of legal and donor relations headaches down the road. There is a variety of different document "types" that relate to charitable gifts, including pledges, deeds of gift, gift agreements and terms of reference. By understanding the differences and using the right form of documentation, organizations can create certainty and avoid complications.

Michael Blatchford LL.B., and Bryan A. Millman LL.B., Norton Rose Fulbright Canada LLP; Elizabeth Moxham, University of British Columbia

GOVERNANCE/FINANCE

General

Government Relations at CAGP

CAGP's Government Relations Committee plays a key role as a voice of the sector on tax and legislative matters related to strategic gift planning and philanthropy. In this session, the Committee Chair will provide an update on key issues the Committee has pursued or weighed in on over the last year, and share the results of a recent member survey that explored the usage of planned giving vehicles and issues for the Committee to explore in the future. Questions, discussion and debate encouraged!

Margaret Mason LL.B., Norton Rose Fulbright Canada LLP

MANAGING A GIFT PLANNING PROGRAM

General

Demonstrate Success: How Do You Know Your Gift Planning Program is Working?

How do we accurately measure the effectiveness of our gift planning programs? A successful planned giving program might mean you don't see the cash until 20 years down the road so you need to measure the other ways you engage donors as indicators of success. This session will show how collaboration is key to the success of a program; how to report on the engagement of donors; highlight the importance of measuring activity; and how to gain the support and buy-in from superiors to invest in the long term results of a planned giving program.

Denise Fernandes, SickKids Foundation

WEDNESDAY MARCH 29

LUNCH AND TABLE TALK DISCUSSIONS

12:30–2:00

EDUCATION SESSIONS 2:15-3:15

GIFT PLANNING ESSENTIALS

Intermediate

Fundraising Without Borders

Looking to expand your fundraising base? Come learn the legal ins and outs of fundraising across Canada and throughout the world. In today's fast-paced and globalized world the rules seem to be constantly changing. Learn about legal and tax issues and concepts when searching for cross border donors. Find out what it takes to fundraise for a charity in other Canadian provinces, navigate foreign tax systems, and create a donor network that works for you.

C. Yvonne Chenier Q.C. and Alexandra Tzannidakis LL.B., Drache Aptowitzer LLP

MANAGING A GIFT PLANNING PROGRAM

Intermediate

Gift Planning and Comprehensive Campaigns

Using Queen's University's recently completed Initiative Campaign as an example, we will explore how the campaign opportunity was leveraged to increase the integration and impact of gift planning as part of the overall advancement activities at the University. Discussion will highlight fundamental donor, volunteer, staff, marketing, communication and administrative strategies needed to successfully incorporate gift planning as an integral part of any comprehensive campaign.

Linda Pearson MBA, MA, Queen's University

TECHNICAL EXPERTISE

Advanced

Tailoring the Philanthropic Discussion

Sponsored by: CIBC Wealth Management

In this session, Jamie will share his approach on how to bring up the philanthropic discussion with different client segments and which tax strategies may work best for each group.

Jamie Golombek CA, CPA, CFP, CLU, CIBC Wealth Strategies Group

ACCREDITATION Some sessions are accredited by The Institute and sponsored by Advocis; some are accredited by FPSC. All sessions are applicable for CFRE points. Visit www.cagpconference.org to learn more.

The more you attend, the more you connect, and simply said, the more you learn.

- Kim Cavener, McGill University Health Centre Foundations and the Royal Victoria Hospital Foundation

TECHNICAL EXPERTISE

Advanced

Ethical and Legal Issues with Vulnerable Donors

The decision of the Supreme Court of Canada in the "right to die" case raises fascinating new questions and issues regarding the meaning of informed consent and capacity of vulnerable persons. While the presentation will not focus on a discussion of this case, it will address how the concepts of "informed consent" and "capacity" of vulnerable persons, in the planned giving context, are shaped by changing social perspectives and legal rules in Canada. Attendees of this presentation will learn how to protect themselves and their organizations while still maintaining and growing donor relationships.

Troy McEachren LL.B. and Nicole D'Aoust LL.B., Miller Thomson LLP

DONOR/CLIENT RELATIONS

General

Multi-generational Gifting Accounts

Studies show that observing giving by family members is a key influencer in decisions by subsequent generations to develop their own personal generosity. Increasingly, donors choose to involve children and grandchildren in decisions around distributions from their family foundations and gifting accounts. This session will discuss case studies of how a number of our clients have used their charitable accounts to further future generosity by their descendants.

Peter Dryden and Mike Strathdee CFP, Abundance Canada

MANAGING A GIFT PLANNING PROGRAM

General

Teambuilding in the Major & Planned Giving Environment

The relationships between planned, major and annual giving operations are often more competitive than they are cooperative. Universities, large interprovincial and national organizations face this issue but so can smaller organizations that are directed by boards that don't fully understand how planned giving fits into the mix of current needs. Doug Puffer will lead a discussion on building a team environment with practical takeaways, policies and a donor focused way of thinking about working together for a common cause.

Doug Puffer, Carleton University

WEDNESDAY MARCH 29

WELCOME RECEPTION 3:15–4:15

OPTIONAL SOCIAL ACTIVITY 6:30

Raptors Game and Dinner or Dine Around

THURSDAY MARCH 30

PLENARY SESSION 8:00-9:00

Voyages of Discovery

Lorna Somers, McMaster University

EDUCATION SESSIONS 9:15-10:45

DONOR/CLIENT RELATIONS

Introductory

Get in the Door: How to Secure More Gifts

Learn how to get donor meetings, how to handle them, and how to steward donors effectively so you obtain even more meetings, grow more relationships and secure more gifts. Learn how to strategize next steps in the donor relationship. Understand how to secure and handle advisor meetings which lead to referrals and yet more gifts. This 90 minute panel session includes a joint presentation with case studies and interactive discussion. For people with 0-2 years experience, but more experienced gift planners, charity staff and volunteers will also benefit.

Doug Flanders MA and Murray Landa LL.B., PGgrowth Inc.

MANAGING A GIFT PLANNING PROGRAM

Intermediate

How to Obtain Serenity Working with Insurance & Investment Companies

Despite the significant rights charities have as owners of insurance policies and other instruments within a planned giving portfolio, working with companies and their representatives can feel like having all of your teeth pulled at once. This session is designed to arm you with the best strategies to make the maintenance of your program vastly easier, and help you understand how and why hurdles appear in your path, and how to get around them with greater ease.

Ryan Fraser CFP, Quiet Legacy Planning Group

MANAGING A GIFT PLANNING PROGRAM

Intermediate

Planned Giving for Pennies: Jumpstart Your Bequest Program

Do you want to reveal legacy prospects in your donor file but you aren't sure how to start? By sharing a true example of what she did to go from zero to 43 confirmed expected bequests in less than one year and raise millions of dollars, Kimberley will provide you with five concrete actions you can take today to boost your legacy program. This session is meant for anyone who has an interest in, or responsibility for a legacy program, in particular those fundraising from small to mid sized organizations who are expected to deliver a legacy program off the side of their desk.

Kimberley MacKenzie CFRE, Kimberley MacKenzie & Associates

COMMUNICATIONS & MARKETING

General

Get Noticed and Get Shared

Showing is better than telling. Use video to bring your conversations with donors up to date, win their attention, and increase their support. Are you daring enough to ride the video wave into the future? YouTube reports mobile video consumption rises 100% every year. Including video in emails leads to a whopping 200-300% increase in click-through rates. Learn how to create quality videos, post them on social networks, and measure results, all on a budget.

Noel Draper, PGgrowth Inc.

DONOR/CLIENT RELATIONS

General

Donor Retention Strategies

This practical hands-on session around planned giving donor retention strategies will include: multi-channel communications tactics for legacy giving donors; various engagement strategies including planned giving donor events; how to integrate planned giving stewardship as a part of your overall stewardship strategy; how your organization can best publicly recognize legacy donors and if this will include a formal legacy giving society; what to do if you have lean marketing resources, a minimal stewardship budget or a small shop.

Janice Moro MBA, CFRE, CHRL, World Vision Canada

COMMUNICATIONS & MARKETING

General

The Gift of Inclusion: Philanthropists Speaking the Truth About Diversity and Charitable Giving

How are demographic changes in Canada transforming the charitable sector? What do emerging donor groups want you to know about their giving interests and traditions? How is diversity challenging the status quo and "best practices" in fundraising? In this panel, you will hear from three inspiring philanthropists about the role of inclusion in giving. Each brings a unique perspective on creating a philanthropic legacy based on an unwavering commitment to advancing inclusion and social equity – here at home and all over the world.

Moderator: Krishan Mehta Ph.D., Ryerson University

Panelists: Raksha M. Bhayana MA, MBA, Bhayana Management; Donette Chin-Loy Chang

THURSDAY MARCH 30

EDUCATION SESSIONS 11:15-12:15

MANAGING A GIFT PLANNING PROGRAM

Introductory

From the Ground Up

How do you launch a planned giving program from the ground up? What if your organization is not fully engaging its base – how do you gain social license to talk about estate plans? Let's dive into successful strategies that you can use to start building your program today. Learn where to start, how to track metrics, how to set expectations with leaders, and most importantly – how to build support and revenue.

Conor Tapp, Green Calgary Association

SKILLS & COMPETENCIES

Intermediate

Refining the Science of Gift Planning Prospecting

Faced with a large spreadsheet of planned giving prospects, how do you refine those names down to the best individual prospects? Although planned giving prospects tend to 'fly under the radar' in many respects, they share some common behaviours and characteristics that can help to reveal their planned giving propensity. Using a research model created at the University of Toronto we will discuss profiles of the best gift planning prospects that participants can tailor to their specific not-for-profits, with data-mining tips for using both internal and external information sources.

Jim Lawson and Erica Sum, University of Toronto

The quality of education and ability to meet and learn from others is worth every cent.

- Crystal Aboud, Cape Breton University

TECHNICAL EXPERTISE

Intermediate

Using Holding Companies for Tax Effective Giving

The advantageous tax treatment of capital gains resulting from donation of securities in kind that are distributed through the capital dividend account of a corporation is one of the best kept secrets in the financial planning industry. Gift planners can alert business owners to this powerful financial planning tool and show them how to make the most cost effective bequests by using strategies involving the capital dividend account.

Tina Tehranchian MA, CFP, The Donor Motivation Program®

MANAGING A GIFT PLANNING PROGRAM

Intermediate

Do's and Don'ts of Donor Information

Recent high-profile media stories have brought to light the challenges of not sharing, or sharing, donor personal information. Canadian laws concerning use of donor personal information vary from province to province, form of fundraising, or sector, and continue to be expanded upon, and in particular the private right of action under Canada's anti-spam law that will come into force on July 1, 2017. This seminar will provide a high level overview of various privacy statutes that may apply to gift planning including federal and provincial privacy laws, provincial health legislation, and Canada's anti-spam laws, and what gift planners need to know to avoid problems in this area of law.

Terrance S. Carter LL.B, TEP, and Ryan Prendergast LL.B., Carters Professional Corporation

TECHNICAL EXPERTISE

Advanced

Valuation of Business Interests

The valuation of private company shares can be a critical factor in gifting decisions. Attendees will take away the following key information from this session: the critical role of a Chartered Business Valuator in the valuation process; what level of assessment is acceptable to Canada Revenue Agency and key items and potential hidden issues to consider when valuing private company shares.

Amanda Salvatori CPA, CA, CBV, MNP LLP

GOVERNANCE/FINANCE

General

Responsible Investing: Insights and Implications for Canadian Not-for-Profits

Canadian not-for-profits are increasingly considering the inclusion of responsible investing criteria in their investment portfolios. This session provides a short "Investors 101" to help fundraisers understand basic investment concepts, an overview of responsible investing, a discussion on how fundraisers can address donor concerns on responsible investing and recommended best practices in the context of the current market environment and donor expectations.

Leila Fiouzi CFA, RBC Phillips, Hager & North Investment Counsel Inc.

THURSDAY MARCH 30

LUNCH AND CAGP AGM 12:30–2:00

PLENARY SESSION 2:30-4:00

FRANK Talks

RECEPTION AND BANQUET 6:00 – 11:00

FRIDAY MARCH 31

PLENARY SESSION 8:00-9:00

Women & Philanthropic Trends Panel

EDUCATION SESSIONS 9:15-10:45

MASTER CLASS

Managing a Gift Planning Portfolio-Best Practices (2.5 hour session)

Sponsored by: Toronto Foundation

This session will explore tactical ways in which fundraisers can organize themselves to build and manage their portfolio of gift planning prospects. With the end in mind, this session will look at strategies to create an efficient portfolio management formula. Whether fundraising represents 10% or 100% of your job, attendees should leave the session feeling prepared to manage fundraising activities and successfully close gifts.

Michelle M.B. Osborne CFRE, University of Toronto

MASTER CLASS

Having the Donor Conversation (2.5 hour session)

Sponsored by: Toronto Foundation

Fundraisers and advisors know that what they really need to be doing is getting out and engaging with donors and clients to explore their values and interests and the issues and causes that are important to them. This session will provide you with tips and tools, along with the opportunity to practice 'having the conversation' in a supportive environment, so that you can have these meaningful and valuable interactions.

Janice Loomer Margolis, JLM Philanthropy; Sara Neely, Victoria Foundation

TECHNICAL EXPERTISE

Intermediate

Gift Annuities Simplified

Gift annuities should be appealing in a low-interest environment and with an aging population. Yet, for various reasons, in Canada, unlike the United States, a relatively small number of gift annuities are completed. In this session you will learn how both self-insured and reinsured gift annuities work, why charities should consider adding gift annuities to their menu of planned gift options, how gift annuities can be marketed, and what developments would unleash their potential.

Frank Minton, Frank Minton Consulting, LLC

COMMUNICATIONS & MARKETING

Intermediate

Repositioning Your Legacy Program

Neurological research on giving and decision-making is changing our sector. There's a shift away from educating and a move towards listening, emotional connection and utilizing donor aspirations to leverage gifts. Some charities are re-framing their legacy programs based on these findings. Find out how this is being done, discover best practices and implementation strategies and review the results they are getting.

Holly Wagg CFRE, Good Works

MANAGING A GIFT PLANNING PROGRAM

Intermediate

Donor Advised Funds: A Strategic Philanthropic Journey

Donor advised funds (DAFs) are integral to the planned giving ecosystem and a great alternative to establishing a private foundation. Using a DAF, donors, their professional advisors and the charities they love come together by maximizing efficiency and impact. This session will show professional advisors how DAFs can help them help their high net worth clients; enable charities to understand how they can engage and partner with donors for greater impact; and donors can learn what a cost effective, self-directed and hassle free strategic philanthropic option could look like.

Moderator: Aneil Gokhale, Toronto Foundation

Panelists: Lesley Ackrill, Interval House; Jean Bryant, Bryant and Soul Foundation; Bob Goldberger, Richardson GMP

MANAGING A GIFT PLANNING PROGRAM

General

Leadership in Turbulent Times

Are you equipped for the complexities of a rapidly changing future? Leaders are expected not only to survive but also thrive in an increasingly interconnected world where small things can make an enormous difference, and changes occur rapidly and often with unintended consequences. This is an interactive session where we look at the latest research and then explore the practical implications for you, for the leadership in your organization, and what this means for Canada's charitable sector.

Carla Funk Ph.D., Funk Management; Lee Sentes, Royal Roads University

FRIDAY MARCH 31

EDUCATION SESSIONS 11:15-12:15

MASTER CLASS

Managing a Gift Planning Portfolio-Best Practices

Continued

MASTER CLASS

Having the Donor Conversation

Continued

GIFT PLANNING ESSENTIALS

Introductory

Data is Your BFF!

Data is the competitive intelligence to help develop insight and drive strategy. But most organizations treat it more like the enemy than an ally. In this session, you'll learn 10 tactics you can implement to make data your 'best friend forever' (BFF) helping you to generate insightful analytics, and positively influence the ways you communicate with your planned giving donors.

Liz Rejman CFRE, Pathways to Education Canada

GIFT PLANNING ESSENTIALS

Intermediate

How to Deal with Problem Executors

A case study will be used to raise awareness of the responsibilities and duties of executors and administrators and the rights of organizational beneficiaries. In addition, the session will provide tools to beneficiaries to assist them in creating effective and practical solutions to deal with problematic executors and administrators.

Raman Johal LL.B., Clark Wilson LLP

TECHNICAL EXPERTISE

Advanced

Charitable Gifting: A Tax Advisors Perspective

The new estate donation rules are now in effect and as we familiarize ourselves with these rules we realize some of the advantages and short comings that we will encounter in estate planning. Creative gifting strategies are also of value to gift planners as we come out of the failed buy low, donate high donation schemes, allowing us to discuss strategies that will minimize the donor's cost of making a gift.

Armando Minicucci CPA, CGA, and Erin Podio, Grant Thornton LLP

SKILLS & COMPETENCIES

General

Defensive Note-Taking

People are always telling you to 'take good notes', but what does that mean? Good notes will protect your employees, your charity and your gifts from a variety of challenges. This session will focus on what you need to record, how to do that during a meeting, and how to follow-up to ensure your notes are most effective. We'll consider actual cases which have turned on written records and review sample checklists which you can use in your own organization.

Eric N. Hoffstein LL.B., TEP, Minden Gross LLP

FRIDAY MARCH 31

PLENARY SESSION 12:30-2:15

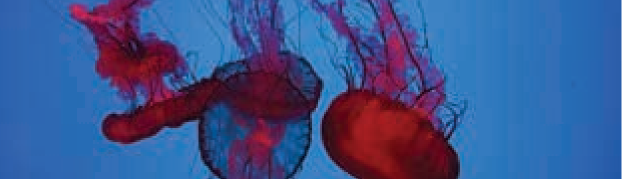
Philanthropy in the Second Era of the Internet

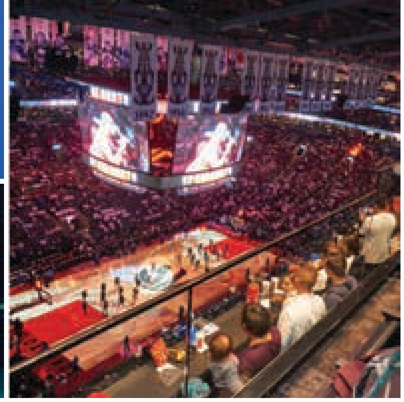
Don Tapscott C.M., The Tapscott Group

OPTIONAL SOCIAL ACTIVITY 3:00

Ripley's Aquarium and Behind the Scenes Tour

Please note: Speakers and program are subject to change





CONFERENCE SOCIAL EVENTS

Exhibit Area – The hub of the conference!

Refreshment breaks, draws, games and other entertainment make the exhibit area a great place to network.

Welcome Reception

Wednesday March 29 3:15

Sponsored by: **CAGP Greater Toronto Area Chapter**

Enjoy a warm welcome to Toronto as you mingle with our exhibitors and sponsors and connect with old and new colleagues and friends.

Raptors Game and Dinner

Wednesday March 29 6:30

Sponsored by: **Blakely**

This signature event will take you to a Toronto Raptors vs Charlotte Hornets basketball game with a superb view of the game from a private Gondola suite. Enjoy VIP treatment, a buffet of stadium style food for a slam-dunk of an evening!

Includes: Private suite seating, stadium style food and non-alcoholic drinks. Vegetarian options are available.

Not included: Transportation and alcoholic drinks

Price: $132.25 (plus HST) | **Deadline to book:** March 3, 2017

Dine Around

Wednesday March 29 6:30

Meet up with friends or join new colleagues and experience the diverse restaurants of Toronto. A list of restaurants will be available prior to the conference and onsite.

Price: Various | **Deadline to book:** March 3, 2017

CAGP Reception and Banquet

Thursday March 30 6:00

Reception sponsor: **Norton Rose Fulbright Canada**

Banquet sponsor: **Legacy Leaders Inc.**

Join us in the exhibit area for drinks and music, followed by dinner and a high-energy dance band performing Soul and R&B music to get your feet moving.

Ripley's Aquarium & Behind the Scenes Tour

Friday March 31 3:00 (min 2 hours)

Discover an underwater adventure as you wander through the Rainbow Reef of exotic fish, enjoy the colour-changing displays of jelly fish and the moving sidewalk through the glass enclosed Dangerous Lagoon! Then join an educator for a personalized behind-the-scenes tour to learn about animal care and the complex systems that keep Ripley's Aquarium running smoothly day-to-day.

Includes: Group admission and 30 minute behind the scenes tour at specified times

Restrictions: Valid for ages 14 and up; not recommended for people with mobility issues

Suggested Attire: casual

Price: $35 (plus HST) | **Deadline to book:** March 3, 2017

GENERAL INFORMATION

CONFERENCE LOCATION AND ACCOMMODATION

Hilton Toronto Hotel
145 Richmond St. W. Toronto, ON M5H 2L2
Reservations: 1-800-445-8667 / 416-869-3456

Room Rates:
Standard room (single or double):
$179 (plus applicable taxes and fees) per night.

Mention the CAGP conference to receive this preferred rate or book directly through the customized web reservations on the CAGP conference website: www.cagpconference.org.

All public spaces and guest rooms include complimentary wireless internet access.

Deadline to book: After March 3, 2017 the special conference rates are not guaranteed and rooms are based on availability.

GETTING TO TORONTO

By Car: The Hilton Toronto Hotel is located in the heart of downtown Toronto in the financial district.

The CAGP conference website provides driving directions to the Hotel.

Parking: Overnight parking 6:00 – 7:00 p.m. is $10. Day parking is $30. For parking locations visit the CAGP conference website.

By Air: The Toronto Pearson International Airport (YYZ) is approximately 45 minutes from downtown Toronto. The Airport has daily direct and non-stop flights from Canada and the United States.

Billy Bishop Airport is a small, international airport located on the Toronto islands. Porter and some Air Canada flights use this airport.

By Train: Union Station is located in the heart of downtown Toronto and a 12-minute walk or quick taxi ride to the hotel. VIA Rail provides regular service along the Quebec-Windsor corridor.

GROUND TRANSPORTATION

The following are transportation options from Pearson airport to downtown Toronto. For full details and other options including Billy Bishop Airport see the Airport Transportation Information on the conference website.

Taxi and Limousine Prices
Taxi: vary, depending on traffic (ranging from $60 – $100 +)
Limousine: flat rate of $58 (gratuity and credit/debit service charges not included)

Union Pearson Express (UP Express)
The UP Express is a direct train between the airport and Union Station (downtown). It is a 25-minute train ride that runs every 15 minutes.

The Hilton Toronto hotel is easily accessible via the underground walkway (PATH) from Union Station.
Price: $12 adult one-way

TRAVEL DISCOUNTS

porter

10% discount on available base fares (with the exception of the lowest class fare during a public seat sale)
Availability: Discounted rates are available from March 26 – April 3, 2017
Promo Code: CAGP17
Porter Reservations

VIA Rail Canada

10% off the best available fare in Economy, Economy Plus, Business, Business Plus, Sleeper, or Sleeper Plus class.

Subject to the conditions and restrictions of the fare plan to which the additional discount is being applied. Discount does not apply in any Escape Class fares.

Availability: March 24-April 4, 2017
Discount Code: 13373
VIA Rail Reservations

Online booking tips: Log in to your profile, or create one prior to booking. On the Passenger information screen, select “Convention fare” from the “Discount Type” drop-down menu, and enter the discount code for your convention or event in the “Discount code” field. The conference fare will be shown on the next page.

WESTJET

10% discount off the airline’s base fare (excluding taxes, fees and charges)
Availability: Discounted rates are available from March 22 – April 7, 2017
Blackout dates: March 24–25, 2017
Coupon Code: 2AA7UGC
Promo Code: YYZ01
WestJet Reservations
WestJet terms and discount restrictions will apply.

ACCREDITATION

Some sessions are accredited by The Institute and sponsored by Advocis. All sessions are applicable for CFRE points and CPD credit will be given for certain sessions. Visit our website to learn more.

BURSARY SUPPORT

Bursaries are available to cover the cost of conference registration. A bursary application form and guidelines can be found at: www.cagpconference.org. Applications must be received by January 23, 2017.

CONNECT WITH CAGP

QUESTIONS?
Tel: 1-888-430-9494 / 613-232-7991 x 222
Email: conference@cagp-acpdp.org
Website: www.cagpconference.org

REGISTRATION INFORMATION

CONFERENCE REGISTRATION FEES Note: HST (13%) is not included in fees	Early Bird (Until Feb 17, 2017)	Regular (After Feb 17, 2017)
Full Conference Fees		
Member*:	$800	$900
Non-member:	$1050	$1200
**In order to benefit from the "member rate", you need to be a member in good standing at the time of the conference.*		
One Day Fees		
Wednesday	$350	$450
Thursday*	$350	$450
**Thursday evening banquet ticket not included*		
Extra Thursday banquet ticket*:	$119.18	
*(*one Thursday banquet ticket is included in the full conference registration fee)*		
Gift Planning Fundamentals		
Pre-conference - Mar 28 | 7:30 – 5:00		
Member:	$350	$350
Non-member:	$400	$400
Bequest Management		
Pre-conference - Mar 28 | 7:30 – 5:00		
Member:	$350	$350
Non-member:	$400	$400
Optional Social Activity – booking deadline March 3, 2017		
Raptors Game and Dinner March 29 | 6:30	$132.25	
Ripley's Aquarium Tour March 31 | 3:00	$35	

Full Conference registration includes:

- all plenary and educational sessions
- continental breakfast and lunch Wednesday, Thursday and Friday
- Wednesday Opening Reception; CAGP Banquet Thursday
- pre- and post-conference web access to all PowerPoint presentations (as released for inclusion)

Payment

Please make your cheque payable to CAGP Toronto 2017. Payment may also be made by Visa or Mastercard®.
HST is not included in fees.

Cancellation and Refund Policy

Notice of all cancellations must be received in writing. Before **March 3, 2017**, if you must cancel your registration, three options are available:

1) Your registration may be transferred to a colleague within your organization at anytime (less a $50 administration fee);
2) Your registration may be carried forward for you to attend the 2018 conference;
3) Your fees may be refunded (less a $200.00 Administration Fee).

There will be no refunds or carry-forwards after March 3, 2017. No-shows forfeit the full registration fee.

The 10 Critical Planned Giving Challenges

A Special Report for nonprofit presidents, executive directors, development professionals and board members.

Newly Updated

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The 10 Critical Planned Giving Challenges

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Or send this coupon with your *name* and *address* to:

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Director, Canada
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Since 1995, we have used our skills to listen to our nonprofits and their donors and taken what we've heard to build and perfect a proactive planned giving system that is the bridge between organizations and their donors.

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We Motivate Planned Giving!

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