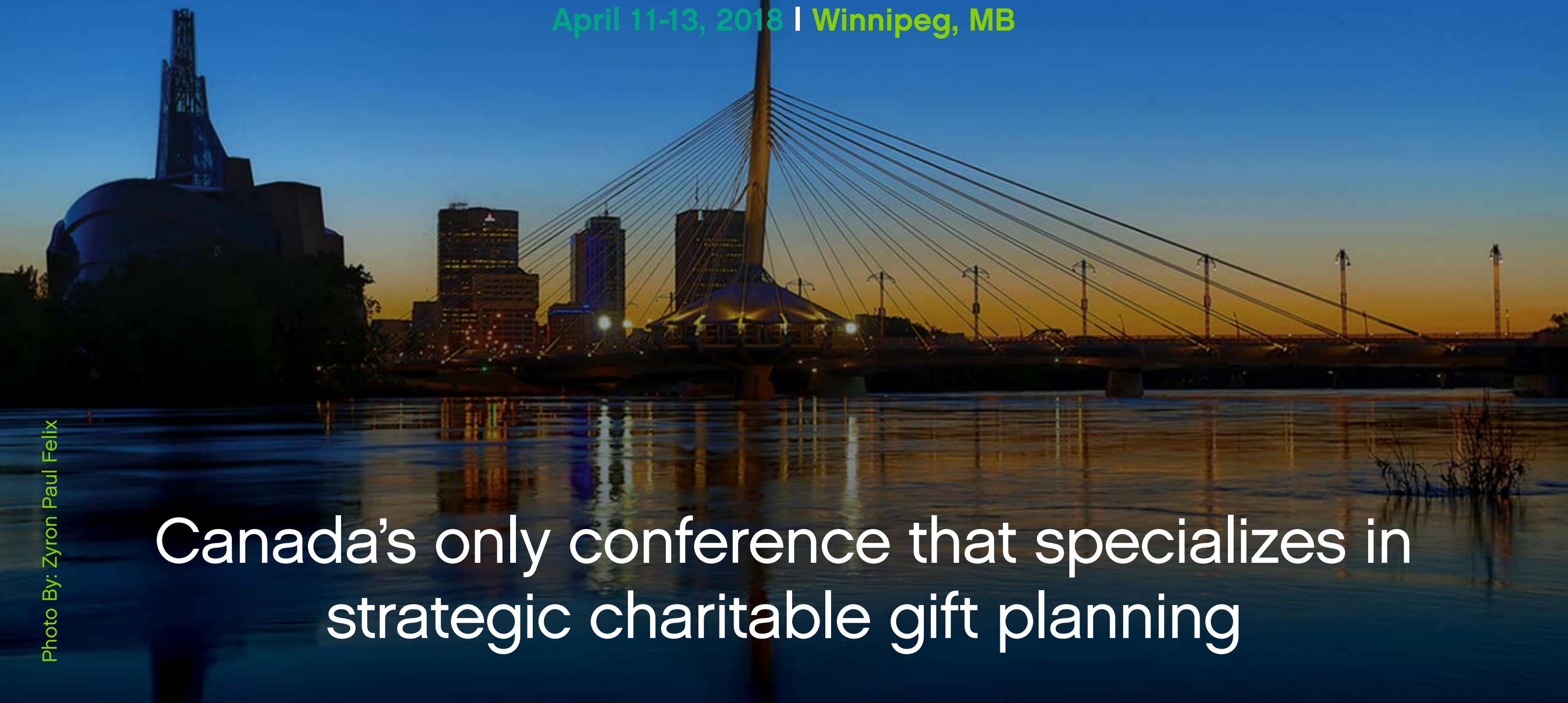
CAGP's
25th National Conference on Strategic Philanthropy

COME EXPLORE THE FUTURE OF GENEROSITY

at The Forks: Canada's Historical Meeting Place

April 11-13, 2018 | Winnipeg, MB



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

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The organizations listed were confirmed at time of publication.

Conference Schedule

AT-A-GLANCE

Conference and Accommodation Location

Fairmont Winnipeg Hotel | 2 Lombard Place Winnipeg, MB R3B 0Y3

TUESDAY APRIL 10	
7:30 – 5:00	Gift Planning Fundamentals
7:30 – 5:00	Leadership in Turbulent Times
8:30 – 4:00	Higher Education Day
3:00 – 6:00	Conference registration open
5:30 – 6:30	First Timers Reception
WEDNESDAY APRIL 11	
7:00	Registration Opens / Breakfast
7:00 – 8:00	Sponsored Breakfast Session
8:00 – 9:00	Opening Plenary session *Speaker:* Gail Asper, The Asper Foundation
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 Plenary session *Speaker:* Roberta Jamieson, Indspire
2:15 – 3:15	Education sessions
3:15 – 4:30	Welcome Reception in the Exhibit Hall
6:30	Optional Social Activities - Across the Board Games Cafe or Prairie 360 Dinner
THURSDAY APRIL 12	
7:00	Registration Opens / Breakfast
7:00 – 8:00	Sponsored Breakfast session
8:00 – 9:00	Plenary session *Speaker:* Tom Deans, Author
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	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 APRIL 13	
7:00	Registration Opens / Breakfast
8:00 – 9:00	Plenary session *Speakers:* Fraser Green, Good Works and Rory Green, Simon Fraser 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 – 2:15	Lunch and Closing Plenary *Speaker:* Alen Okanovic, Canadian Red Cross
2:30	Optional Social Activity – Canadian Museum for Human Rights Tour

Please note: speakers and program are subject to change.

PLENARY SESSIONS

Wednesday April 11 8:00 a.m.

The Donor Journey-A Personal View

Gail Asper O.C., O.M., LL.D.,
The Asper Foundation

Gail Asper has a long history of family giving. As President and a Trustee of The Asper Foundation, Gail and her family have developed major initiatives locally, nationally and internationally supporting a wide range of causes. In this address, Gail will offer insights of her motivations as a donor, what influences her choice of charitable causes, and her view of the philanthropist's role in the community. She will also share advice on how to connect with donors, and reflect on the evolving roles of donor and philanthropist as she works with her own children in The Asper Foundation.

Sponsor: THE ASPER FOUNDATION

Wednesday April 11 12:30 p.m.

The Challenge, the Opportunity: Establishing Relationships with Indigenous Peoples to Achieve Lasting Change

Roberta Jamieson, Indspire

It is not easy to speak or hear about the wrongs that have been committed against Indigenous Peoples, but Roberta Jamieson does that with mastery and authenticity. She tells a difficult and painful story while putting forward a cathartic vision that Canadians can work together to make a difference for future generations. Roberta presents solid ideas that will ensure sustainable Indigenous communities in Canada's future. She draws upon her culture and her history in speaking of the Indigenous philosophy of philanthropy, which goes beyond "generosity" and involves reciprocity with the ceremony of "one bowl and one spoon. "In this way she inspires each audience member to play a role in making the original promise good.

Sponsor: TD

Thursday April 12 8:00 a.m.

Family Meetings: The New Epicentre of Planned Giving

Tom Deans Ph.D., Intergenerational Wealth Expert & Author of *Every Family's Business* and *Willing Wisdom*

As the greatest generation of wealth creators enters the final phase of their lives, the role that advisors can play in facilitating family meetings can have a profound impact on charitable giving. Prepare to unlearn everything you thought you knew about secret wills as Dr. Tom Deans explores the connection between estate planning, late-in-life care and family giving in the new age of transparency.

Sponsor: RBC Wealth Management PH&N Investment Counsel

Thursday April 12 12:30 p.m.

CAGP Annual General Meeting

The year was 1993. Kim Campbell became Prime Minister; This Hour Has 22 Minutes premiered; the Stanley Cup and the World Series were BOTH won by Canadian teams; and…CAGP was founded! For our 25th Annual General Meeting there will be exhilarating reports from the Board Chair and the President & CEO, a riveting presentation of audited financial statements, and an election of new Board members that will have you on the edge of your seat. Perhaps a special treat or two and maybe someone will sing the CAGP song (lyrics by Peter Chipman and set to the theme of The Beverly Hillbillies!). With the official business over, you'll hear about the CAGP Foundation's exciting work to ensure CAGP's next 25 years, creating a better world through strategic charitable giving.

Thursday April 12 2:30 p.m.

FRANK Talks

So named to honour Dr. Frank Minton and the tremendous impact he has had on planned giving in Canada. In this thought-provoking plenary session, seven dynamic individuals will each speak for 7 minutes to share their vision on this year's FRANK Talks theme: What is the Future of Generosity?

Sponsor: MILLER THOMSON AVOCATS | LAWYERS

Friday April 13 8:00 a.m.

Generosity Through Three Generations

Fraser Green, Good Works and Rory Green, Simon Fraser University

Fraser Green is a baby boomer born in 1955. His daughter Rory is a millennial born in 1988. Rory's daughter Audrey was born last June. What will the world of philanthropy – and generosity – look like when Audrey celebrates HER thirtieth birthday? Fraser and Rory will share their perspectives on what will change – and what will remain intact – as we look toward the philanthropic horizon.

Sponsor: TDS Thompson Dorfman Sweatman LLP

Friday April 13 12:30 p.m.

From Refugee to Gift Planner: The Power of Generosity

Alen Okanovic, Canadian Red Cross

Alen will share his personal and inspirational story as a refugee during the Bosnian war, risking his life to cross borders, and finally making it to Slovenia where he registered as a refugee with the Red Cross. Thanks to many charities, he and his sister found their way to Canada to start a new life. This presentation will be especially relevant in Manitoba as the home of the Canadian Museum for Human Rights and where refugees have recently risked their lives to cross the US-Canada border in winter. Alen is a powerful example of the potential of philanthropy to change individual lives.

Sponsor: BMO Wealth Management We're here to help.

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

These sessions 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 and Marketing

Sponsor:
Good Works

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

Sponsor:
Strategic Philanthropy Inc.

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 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

Sponsor:
MLT Aikins LLP

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

Created for participants of all skill levels, Master Class 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 (e.g. discussions, case studies and group projects) 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 2018 Master Class Series will feature the following topics:

- Tax Smart Giving for Business Owners
- Gift Planning for Small Shops
- Bequest Management for Charities

Sponsor: The Winnipeg Foundation — For Good. Forever.

Education Sponsor

THE DONOR MOTIVATION PROGRAM™
We Motivate Planned Giving!

PRE-CONFERENCE SESSIONS

Sponsor: University of Manitoba

TUESDAY APRIL 10 7:30–5:00

Gift Planning Fundamentals

Whether you are new to gift planning or someone 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.

Paul Nazareth, CanadaHelps; Jill Nelson, CFRE, Princess Margaret Cancer Foundation

2018 CFRE Approved Provider for Continuing Education

The Institute for Advanced Financial Education

This course is applicable for 7.0 CFRE Credits

Institute accredited CE (7.0 credits)

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

8:30–4:00

Higher Education Day

This day-long session will feature a presentation by a leader in higher education fundraising, a panel discussion and many opportunities to exchange best practices and challenges with our colleagues from across the country.

5:30–6:30

First Timers Reception

New to the CAGP conference? We'd like to welcome you to the conference with a fun, kick-off event for first timers. You'll meet Board members from CAGP and the CAGP Foundation, as well as our welcoming staff and key conference volunteers. You'll get a head start on networking and generating ideas to help you make the most of your conference experience.
An invitation will be sent to all first time delegates.

Sponsor: RGF Integrated Wealth Management

WEDNESDAY APRIL 11 7:00 – 8:00

Sponsored Breakfast Session

Title and description unavailable at time of printing

PLENARY SESSION 8:00-9:00

The Donor Journey-A Personal View

Gail Asper O.C., O.M., LL.D., The Asper Foundation

EDUCATION SESSIONS 9:15-10:45

MASTER CLASS

Sponsor: The Winnipeg Foundation

Tax Smart Giving for Business Owners
(2.5 hour session)

This session explores the pros and cons of using the Immediate Financing Arrangement strategy for maximizing charitable bequests by business owners; as well as the added benefits of donation of securities in kind by a corporation; and the pros and cons of donating flow through limited partnerships owned by a corporation.

Ali Spinner CPA, CA, TEP, Crowe Soberman; Tina Tehranchian, The Donor Motivation Program

GIFT PLANNING ESSENTIALS — Introductory

Gift Planning Overview

This session is designed to give a high level, 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 review the key terminology and basic understanding necessary to make the most of other sessions during the conference. We will arm you with practical ideas and resources to jumpstart your understanding of planned and strategic giving.

DeWayne Osborn, Cardinal Capital Management; Beth Proven CIM, CFRE , Winnipeg Symphony Orchestra

COMMUNICATIONS & MARKETING — Intermediate

Sponsor: Good Works

Creating a Comprehensive and Sustainable Communication and Marketing Strategy

We've all heard about the buried treasure that's waiting to be uncovered through strategic charitable giving - but it's hard to know where best to focus our energies. Kim and Peggy will share a series of effective strategies for identifying, engaging and stewarding planned giving donors by tapping into the wealth of your database, the expertise of your colleagues, and the richness of the communication and marketing tools you have at your disposal, whatever the size of your shop (or ship!).

Kim Cavener, McGill University Health Centre Foundation; Peggy Killeen, CFRE, Concordia University

SKILLS & COMPETENCIES ____________ General

Blended Gifts: The Ultimate in Donor Centric Collaboration

A blended gift is a gift structure where donors give something now, something later, and perhaps something in-between. Blended gifts attend to the types of assets held by donors while addressing their concerns for current and future personal needs. Gift plans and structures are designed for donors to see the full impact of their optimal gift. Donor centric blended gift plans are appealing as they provide donors the greatest opportunity to maximize their gift's impact but minimize financial concerns.

Grant Monck LL.B., Strategic Fundraising Consultant;
Doug Puffer, Carleton University

MANAGING A GIFT PLANNING PROGRAM ____ General

A Global Perspective of Legacy Giving

What can we learn from legacy programs in the UK, the Netherlands or Japan? Lots! The cultural differences between these countries create unique challenges as well as opportunities that push legacy fundraisers to innovate and to develop unique giving opportunities. Using case studies and research, this session will explore how legacy programs differ from the Canadian market and what we can learn from them that could offer a unique opportunity.

Ligia Peña CFRE, Greenpeace International

SKILLS & COMPETENCIES ____________ General

Taking Charge: Preparing & Positioning Yourself in Today's Non-Profit Sector

Gift planning and fundraising are fun, rewarding and very busy roles. Most often you are so busy doing your job that you forget to plan your career and understand what the sector most needs. What's next? What skills does the non-profit sector need today? Led by an executive search professional and a non-profit leader, we will explore options for pro-actively planning and determining your best course of action, understand the common gaps and how to address them.

Deborah Legrove, CFRE, crawfordconnect;
Dino Sophocleous, CFRE, Hospitals of Regina Foundation

WEDNESDAY APRIL 11

EDUCATION SESSIONS 11:15-12:15

MASTER CLASS ____________

Tax Smart Giving for Business Owners (continued)

Exemplary learning experience in Canada for charities... plus!! Great way to recharge your batteries!!!

Lori Scott, QEII Health Sciences Centre Foundation

COMMUNICATIONS & MARKETING ______ Intermediate

Sponsor: Good Works

21st Century Planned Gift Marketing

Never before have planned gift marketers faced such a range of choices: direct mail, newsletters, telemarketing, e-surveys, and drip email programs. In this session we will compare results from real campaigns to help participants better understand the options available to them. Participants will return to their organizations understanding the benefits, costs, and results of each channel and prepared to make strategic marketing decisions that will maximize results.

Mikhael Bornstein, SickKids Foundation

TECHNICAL EXPERTISE ____________ Intermediate

Sponsor: MLT Aikins LLP

Three Easy Ways to Incorporate Insurance in Your Planned Giving Program

This session will explore 3 easy ways to incorporate insurance into your planned giving program and help bring in guaranteed current and future gifts while strengthening your relationships with your donors.

Ross Young CA, CFP, FEA, Secure Capital Management Ltd.

SKILLS & COMPETENCIES ____________ Intermediate

How to Maximize Data to Enhance Your Gift Planning Program and Direct Mail Campaigns

In this session gift planners from any size organization will learn to use big data in a way they haven't before. Learn how you can better target your messaging to influence people within your NFP's community or encourage them to leave a lasting legacy to a cause that is important to them. Whether through a direct mail appeal, cross fundraising approach or a face to face ask, data can help.

Allen Davidov MBA, Environics Analytics;
Dwayne DiPasquale, Mackenzie Health Foundation

TECHNICAL EXPERTISE ____________ Intermediate

Sponsor: MLT Aikins LLP

I've Changed My Mind! Amending the Terms of a Planned Gift

Restricted gifts are commonplace, yet one of the hallmarks of a "gift" is that charities and donors often have limited ability to amend its terms after a gift is made. But charities and/or donors may nonetheless change their minds and find themselves wanting to amend the terms of a gift. This workshop will examine the extent to which the terms of a planned gift can be amended, with court approval or otherwise, as well as how to draft sufficiently flexible gift terms in the first place so as to avoid the need for court approval.

Kate Bake-Paterson LL.B. and Roger Lee LL.B.,
DLA Piper (Canada) LLP

Remember! CAGP members receive 20% off CFRE certification or recertification!

DONOR/CLIENT RELATIONS _____________ Intermediate

Sponsor: Strategic Philanthropy Inc.

Get Results! How to Unleash the Power of Stewardship

Make giving much more satisfying for your donors and fundraising easier for you. Improve your donor retention. Get out of chase mode and find natural, undisclosed giving opportunities that exist right under your nose. You can accomplish all this through strong, thoughtful stewardship. Make stewardship a priority and reap the rewards. This presentation includes case studies and interactive discussion.

Theresa Butler-Porter, Lakefield College School Foundation; Murray Landa LL.B., PGgrowth Inc.

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 PH&N Investment Counsel Inc.

WEDNESDAY APRIL 11

PLENARY SESSION 12:30–2:00

The Challenge, the Opportunity: Establishing Relationships with Indigenous Peoples to Achieve Lasting Change

Roberta Jamieson, Indspire

EDUCATION SESSION 2:15-3:15

MANAGING A GIFT PLANNING PROGRAM _ Intermediate

Due Diligence in Gift Documentation

It is important for gift planners and charities to keep clear and full records in relation to gift solicitation and the terms of gifts in order to ensure gift restrictions and donors' intent are complied with. It is also important to learn how to track the records being kept. This session will cover these issues and also discuss the potential pitfalls if insufficient records are maintained.

Theresa L.M. Man LL.B., LL.M. and Terrance S. Carter LL.B., TEP, Carters Professional Corporation

Register online at:
www.cagpconference.org

MANAGING A GIFT PLANNING PROGRAM _Intermediate

Faith-based Fundraising Panel

Fundraising in a faith based charity has many nuances and strategies that are very different from mainstream philanthropy. In fact, faith based fundraising IS mainstream according to the Canada Revenue Agency. This panel will bring together fundraising leaders from across the faith charity community to share strategy, experience and look ahead to where we need to be in the future.

Moderator: Paul Nazareth, CanadaHelps

Panelists: To be confirmed

TECHNICAL EXPERTISE ________________Intermediate

Sponsor: MLT Aikins LLP

Charitable Gifts Made Through Trusts

This session will explore gift planning opportunities involving trusts. It will highlight important tax, trust and other gift planning issues that you should be aware of when dealing with these types of gifts. It will also explore some of the practical issues that may arise when dealing with the administration of trust gifts.

Laura West J.D., Norton Rose Fulbright Canada LLP

GOVERNANCE/FINANCE ____________________General

Government Relations at CAGP

The national Government Relations Committee continues its work to champion the growth and development of strategic charitable gift planning in Canada. The focus of this year's session will be a panel discussion on emerging topics with panelists bringing the perspectives of charities, donors and professional advisors to the table. Committee Chair, Grant Monck will moderate the session and there should be a lively discussion from the panel and the audience on topics affecting all CAGP members.

Moderator: Grant Monck LL.B., Strategic Fundraising Consultant

Panelists: To be confirmed

COMMUNICATIONS & MARKETING ___________General

Sponsor: Good Works

Once Upon a Time: How to Tell Great Legacy Stories

Neuroscience has proven beyond a doubt that storytelling is the most powerful and persuasive way that humans communicate with each other. Fraser will help you understand how to tailor superb legacy giving stories that your planned giving prospects are going to love. During this engaging and entertaining hour, Fraser will show you how to find the right storytellers and tell the right stories that will result in gifts!

Fraser Green, Good Works

DONOR/CLIENT RELATIONS _________________General

Sponsor: Strategic Philanthropy Inc.

Wisdom of the Ages: Building Successful Intergenerational Relationships

Using stories and humour, we will lead you into the murky forest of intergenerational communication. How do you talk to a donor who is three times your age? And what if communicating with millennials is more than just a tweet? Find out strategies to work with colleagues and donors who come from another era, including playing to your own strengths, questions to break the ice and how not to offend.

Dave Magnuson-Ford and Julia Magnuson-Ford,
Tiny Frog Strategies

THURSDAY APRIL 12

7:00 – 8:00 SPONSORED BREAKFAST SESSION

Sponsor: PearTree Financial Services Ltd.

Flow Through Share Donations – A Proven Philanthropic Strategy

Flow Through Share Donations (FTSD) are a proven philanthropic tool for donors and charities and part of a major gift donor's personal financial strategy. In this session you will learn the steps a donor takes to complete a FTSD, including consultation with their tax, legal and wealth advisors, and gain insight into how to approach your donors about this Canadian innovation.

PLENARY SESSION 8:00-9:00

Family Meetings: The New Epicentre of Planned Giving

Tom Deans Ph.D., Author

EDUCATION SESSIONS 9:15-10:45

MASTER CLASS ________________________________

Sponsor: The Winnipeg Foundation

Gift Planning for Small Shops (2.5 hour session)

Gift Planning can be a BIG job – how do you get it done in a SMALL shop? Our two presenters have overcome that challenge and will walk you through the essentials, from getting Board buy in, figuring out and advocating for a reasonable budget, developing (or borrowing) expertise, and undertaking an inexpensive marketing plan. Come with your sleeves rolled up and expect discussion, stories, and examples of solutions that work!

Jane Anema, Sarnia Community Foundation;
Susan McLean, CFRE, Strathroy-Middlesex Hospital Foundation

It was educational, fun, interactive and inspiring!

Megan Doyle Ray, CHEO Foundation

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.

REMEMBER TO DOWNLOAD OUR MOBILE APP!

Sponsored by PearTree Financial Services.

GIFT PLANNING ESSENTIALS ____________ Introductory

Loyalty Without Limits - Maximizing Lifetime Value Through Legacy Giving

The future of philanthropy is in creating an enriching experience for your existing donors by understanding and leveraging their loyalty to your cause. Knowing when to ask one more question: 'Would you consider a gift in your Will?' can impact lifetime value by a factor of 30 or more. Focusing on loyal annual donors, we discuss proven strategies for elevating your charity to the status of a loved one – a beneficiary in their Will.

Neil Williams, PGgrowth Inc.

DONOR/CLIENT RELATIONS ______________ Advanced

Sponsor: Strategic Philanthropy Inc.

How to Engage the Next Generation of Philanthropists

This session will explore both the Toronto Foundation's pilot initiative to engage 'Next Gen' donors as well as the Toronto Symphony Orchestra's young professionals' donor program. The session will discuss how to engage this donor demographic in a collaborative giving and learning journey that allows participating donors to engage with each other and feel connected to, and have an impact on, the issues and organizations they support.

Aneil Gokhale, Toronto Foundation; Troy McEachren LL.B. TEP, Miller Thomson LLP

COMMUNICATIONS & MARKETING _______ Intermediate

Sponsor: Good Works

Cases for Support: Not Just for Capital Campaigns!

We often associate a case for support with a capital campaign when, in fact, every organization and every program needs to present a solid reason for donors to give. In this session, participants will learn about the power of a strong case in building support, both internally and externally, and will walk away with the tools to make it happen in their own organization.

Leah Eustace, ACFRE, Blue Canoe Philanthropy

TECHNICAL EXPERTISE __________________ General

Sponsor: MLT Aikins LLP

Legal Issues in Fundraising on Social Media

Social media is quickly becoming the primary means of fundraising for charities in Canada. However, the legal implications of undertaking online fundraising are not always well understood. This session will identify developing trends of fundraising on social media and identify legal issues that need to be considered as well as applicable risk management considerations.

Terrance S. Carter LL.B., TEP, Carters Professional Corporation

SKILLS & COMPETENCIES _________________ General

Building Strong Relationships Between Advisors and Gift Planners

Lets explore relationships from the combined perspective of the fundraising professional and the professional advisor. Together we will help the donor identify their legacy and secure a gift for the charity. The key is to make planned giving a priority in a way that works for your organization while educating donors, colleagues and volunteers along the way. We will also look at the important reciprocal relationship with professional advisors.

Alexis Gaiptman, CFRE, Jewish General Hospital Foundation; Jeremy Hampson, CFP, CLU, The Donor Motivation Program

THURSDAY APRIL 12

EDUCATION SESSIONS 11:15-12:15

MASTER CLASS ______________________________

Gift Planning for Small Shops (continued)

DONOR/CLIENT RELATIONS ____________ Intermediate

Sponsor: Strategic Philanthropy Inc.

When Your Donor Doesn't Want to Meet

You have a great prospect for a legacy gift – but they say no to your invitations to meet… Now what? This session will help you engage the shy, the introverted and the busy donors who always say no to a meeting. Cultivating, converting and stewarding a donor who will not meet with you might sound impossible, but this session provides concrete tips and ideas to engage these hard to reach donors.

Aimée Lindenberger, Refocus Communications & Fundraising

SKILLS & COMPETENCIES ______________ Intermediate

Tax Effective Gift Strategies During Lifetime and After Death

Tax considerations are at the heart of what gift planning is all about. This session will focus on providing participants with an understanding of the key tax considerations gift planners should be aware of when advising donors, and will touch on the recent tax changes to testamentary charitable giving. Topics will include: an understanding of the donation tax credit system, exemptions from capital gains tax for certain types of gifts, charitable bequests, the new rules relating to special types of gifts such as life insurance, RRSPs, RRIFs and TFSAs, and touch on the renewed interest in gift of private company shares and charitable giving.

M. Elena Hoffstein LL.B. and Darren Lund LL.B., Fasken Martineau DuMoulin LLP

What a privilege to spend a few days with some of Canada's top experts in the gift planning field.

Sarah MacDonald, Knowledge Network

GOVERNANCE/FINANCE — Advanced

Donation of Bitcoin and Other Cryptocurrencies

Many gift planners have heard of Bitcoin but there are hundreds of other cryptocurrencies out there with many more created daily. Indeed, the entire asset class is worth over $100 billion dollars and is growing daily. Gift planners interested in the future of generosity must understand this asset class and how to attract donations of it.

Adam Aptowitzer LL.B. and Karen J. Cooper LL.B., Drache Aptowitzer LLP

GOVERNANCE/FINANCE — General

The Charity's Right to Information from Executors and Trustees

What right do you have to information from an Estate Trustee? What about information from a company whose shares are held by a trust or estate? Charities need information to monitor the administration of a trust or estate to ensure they are receiving the intended bequest in a timely way. This session will examine what information you need in order to manage a testamentary gift and how to get that information. You will learn practical tips for working with executors and trustees to ensure charitable gifts are honoured and paid in full.

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

SKILLS & COMPETENCIES — General

Retirement: The Final Frontier?

We've all heard about the great wealth transfer in Gift Planning. What about the great talent transfer? Many of us are reaching the end of our careers as gift planners. How do we transition out of our jobs, plan for our own retirement, and give back to our profession? In this free ranging panel discussion, CAGP members at various points along the retirement path will discuss these and other intriguing issues.

Charles O'Neil EPC, QEII Health Sciences Centre Foundation; Doug Puffer, Carleton University; Heather Warren

THURSDAY APRIL 12 12:30–2:30

Lunch and CAGP AGM

PLENARY SESSION 2:30-4:00

FRANK Talks

FRIDAY APRIL 13

PLENARY SESSION 8:00-9:00

Generosity Through Three Generations

Fraser Green, Good Works and Rory Green, Simon Fraser University

EDUCATION SESSIONS 9:15-10:45

MASTER CLASS

Sponsor: The Winnipeg Foundation

Bequest Management for Charities (2.5 hour session)

Gift planning marketing and carefully built relationships eventually culminate in a gift from a donor's estate. Such a gift imposes both rights and obligations upon a charity. This master class will cover legal fundamentals and practical considerations for the day-to-day reality of managing estate administration. We will focus on best practices, and tips and techniques to honour the legacy of the donor while maintaining your charity's integrity as a fiduciary beneficiary.

Jill Nelson, CFRE, The Princess Margaret Cancer Foundation; Jasmine Sweatman, J.D., LL.M., TEP, C.S., EPC, CPCA, Sweatman Law Professional Corporation

COMMUNICATIONS & MARKETING — Introductory

Sponsor: Good Works

The Changing Face of Canada: What's Your Multicultural Strategy?

The face of Canada is changing. Any individual, company or institution that fails to understand this will be left behind. This insightful discussion explores the changing face of Canada, the changing needs of Canadians and will shed light on what's to come. Bobby Sahni will share perspectives, perceptions and experiences on how to win in an increasingly diverse world – today, tomorrow and in the future.

Bobby Sahni MBA, Ethnicity Multicultural Marketing + Advertising

TECHNICAL EXPERTISE — Intermediate

Sponsor: MLT Aikins LLP

Wealth Management Profiles: How Donors Hold Their Wealth

Understanding how high net worth donors typically hold their wealth, achieve clarity as to what planned gift they want to do, the hurdles they must overcome, and the role their advisors and the charity play to complete the gift, can be very interesting and informative for any planned or major gift officer.

Leilani J. Kagan LL.B., Thompson Dorfman Sweatman LLP; Patrick O'Connor FEA, CFP, CLU, TEP, CH.F.C. Blackwood Family Enterprise Services; DeWayne Osborn CPA, CGA, CFP, Cardinal Capital Management Inc.

TECHNICAL EXPERTISE — Advanced

Sponsor: MLT Aikins LLP

Cross Border Gift Planning from a Canadian Charitable Perspective

Cross border philanthropy is thriving for some Canadian charities. Don't get anxious when donors start talking about cross border issues. In this session we will discuss basic information that a planned giving officer needs to know to allow for planned gifts in support of charitable activities outside of Canada and how people outside of Canada can support Canadian charities and charitable activities in Canada.

Mark Blumberg LL.B., LL.M., TEP, Blumberg Segal LLP

COMMUNICATIONS & MARKETING ___________General

Sponsor: Good Works

Beyond "Likes" to "Trusted Conversations"

The "trusted conversation" has been the pinnacle of relationship development to move donors from transactional to transformational gifts. Our world is changing – is it time to change the lens and the view plane in building meaningful donor relationships? This session will explore maximizing future generosity by enhancing the donor relationship from Facebook "likes" to ultimate trusted conversations and gifts of a lifetime.

Rosalie Courage and Lisa Mills, CFRE, RBR Development Associates Ltd.

TECHNICAL EXPERTISE ___________________General

Sponsor: MLT Aikins LLP

Innovative Gifts and Tax Receipting – Getting it Right

Canada Revenue Agency has reported that the top compliance issue for Canadian registered charities is improper receipting. This session will explore the legal and regulatory requirements and highlight the key issues for gift planners, donor advisors and charities to consider when evaluating proposed gifts and gifting arrangements, donor recognition strategies, the issuance of charitable donation receipts and gift acceptance and valuation policies.

Florence I. Carey LL.B., MLT Aikins LLP

FRIDAY APRIL 13

EDUCATION SESSIONS 11:15-12:15

MASTER CLASS ________________________________

Bequest Management for Charities (continued)

MANAGING A GIFT PLANNING PROGRAM _Intermediate

Calculating an ROI for Your Planned Gift Marketing

Planned gifts are among the most important and misunderstood gift strategies but can account for 30-50% of an organization's annual revenue. Given the extended lead-time between investment in a program and receipt of 'bookable' cash, we need to report an understandable return on investment to show value in our work. Because marketing is our primary lead generator, let's look at how we can calculate and report an ROI in a consistent and universal way.

Katherine Swank J.D., Target Analytics, a division of Blackbaud, Inc.

DONOR/CLIENT RELATIONS _____________Intermediate

Sponsor: Strategic Philanthropy Inc.

Transitional Questions and the Art of Being Meaningful

How do you build a meaningful connection with someone you have just met? This session will increase your success rate on your discovery calls by taking a deep dive into those first few conversations where there is an opportunity to go deeper and create a long lasting connection. We'll cover the "structure" of a meaningful conversation and we'll compile a list of amazing transitional questions to appeal to different donor archetypes.

Jenny Mitchell, CFRE, DMA, Chavender

TECHNICAL EXPERTISE _________________Advanced

Sponsor: MLT Aikins LLP

KYC, Anti-Money Laundering and FATCA Issues

Have you ever had a Board member ask how significant donors are vetted? In your donor research have issues arisen regarding the source of a donor's wealth? The international anti-money laundering regime is becoming more and more complicated and risk management issues are beginning to arise for charities. Learn about the issues and whether or not you should consider managing this risk with potential donors.

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

MANAGING A GIFT PLANNING PROGRAM _____General

From Side Show to Main Event: Planned Giving's Moment to Shine

The great wealth transfer is upon us but many charities are still unprepared to seize the unprecedented opportunities this represents. This session will look at best practices among successful planned giving programs and engage participants in a brainstorming session as we collectively define what strategic philanthropy means in the face of this tremendous opportunity.

Moira Dossetor Ph.D., and Nicholas Offord, The Offord Group

GIFT PLANNING ESSENTIALS ________________General

Guidelines for Making Ethical Choices

Earning the donor's trust is at the heart of a good planned giving strategy. The commitment to ethical behavior is essential to achieve this goal. We will briefly review the CAGP Code of Ethics and clear out some confusion, for example, the notion of "conflict of interests" in a charity. We will also present practical examples involving ethical issues and suggest guidelines that will help you face difficult situations.

Francine Cardinal LL.B., MBA, and Nancy Lepage, University of Montreal

FRIDAY APRIL 13

PLENARY SESSION 12:30 – 2:15

From Refugee to Gift Planner: The Power of Generosity

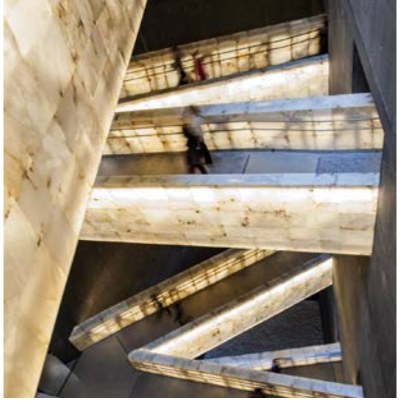
Alen Okanovic, Canadian Red Cross

Please note: *Speakers and program are subject to change*

It always amazes me how much I feel at home when I am amongst a group of people who want to make a difference in the world, who are life long learners and want to have fun doing it!

Betty-Anne Howard, Making Your Dreams a Reality Financial Services






CONFERENCE SOCIAL EVENTS

Exhibit Area – the hub of the conference!

Drop by and find out how the services and products of our exhibitors can help your organization be more productive. Refreshment breaks, draws, games and other entertainment will make the exhibit area a great place to network.

Welcome Reception
Wednesday April 11 — 3:15 p.m.

Sponsor: **The Offord Group**

Enjoy a warm Prairie welcome as you mingle with our exhibitors and sponsors and connect with old and new colleagues and friends. Students from the University of Manitoba's music department will provide the ambiance.

Prairie 360
Wednesday April 11 — 6:30 p.m.

Leave the daily grind behind, 30 floors below, and experience an unparalleled view of Winnipeg at this revolving restaurant. Prairie 360, named as one of Canada's top new restaurants, will treat you to locally inspired dishes and truly magnificent culinary delights.

Includes: A choice from 3 entrees, salad and dessert
Not included: Drinks at dinner; transportation
(15 minute walk from the hotel)
Suggested Attire: Business casual
Price: $65.34 (plus GST) | **Deadline to book:** March 19

Across the Board Game Café
Wednesday April 11 — 6:30 p.m.

It's game night! Choose from a library of over 1100 board games and link up with other CAGP players to enjoy an evening of teamwork, discussion and just plain fun. Dine and play or just cheer on your favourite gamers while enjoying a casual meal.

Includes: Choice of games, complimentary drink
Not included: Casual meal, additional drinks, transportation
(5 minute walk from the hotel)
Price: $16 (plus GST) | **Deadline to book:** March 19

CAGP's 25th Anniversary Celebration
Thursday April 12 — 1:30 p.m.

Sponsor: **TD**

Join us for a celebratory dessert in the exhibit area and toast CAGP's 25 years as an association, creating a better world through strategic charitable giving.

CAGP Reception and Banquet
Thursday April 12 — 6:00 p.m.

Banquet Sponsor: **Legacy Leaders Inc.**

Banquet Entertainment Sponsor: **Great-West Life**

Join us in the exhibit area for drinks and music, followed by dinner and the Ron Paley band, a first class band performing music that will keep your feet moving.

Canadian Museum for Human Rights
Friday April 13 — 3:00 – 4:30 p.m.

A striking landmark in the city, the Museum is an iconic place located near the historic Forks, the place where the Red and Assiniboine Rivers meet in Winnipeg. On this tour you'll be introduced to compelling stories in the Museum's galleries, engage in interactive experiences and connect to thought-provoking spaces where human rights education, discussion and inspiration take place.

Includes: 90 minute English tour (Gallery closes at 5:00 p.m.)
Not included: Transportation (10-15 minute walk from the hotel)
Price: $18 (plus GST) | **Deadline to book:** March 19

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