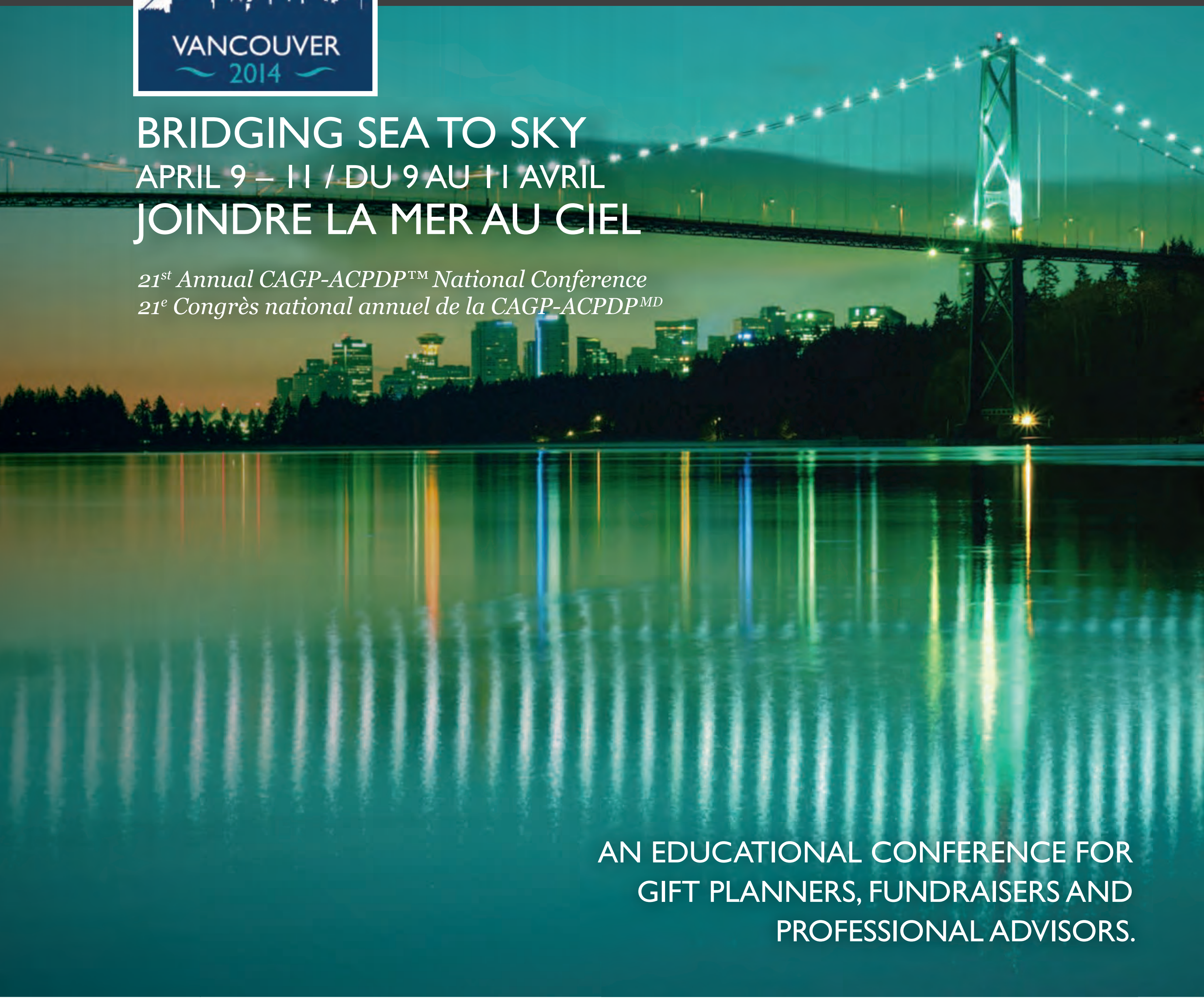
CAGP • ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONS PLANIFIÉS

VANCOUVER
2014



BRIDGING SEA TO SKY
APRIL 9 – 11 / DU 9 AU 11 AVRIL
JOINDRE LA MER AU CIEL

21st Annual CAGP-ACPDP™ National Conference
21e Congrès national annuel de la CAGP-ACPDP MD

AN EDUCATIONAL CONFERENCE FOR GIFT PLANNERS, FUNDRAISERS AND PROFESSIONAL ADVISORS.

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The organizations listed were confirmed at time of printing.

BRIDGING SEA TO SKY
APRIL 9 – 11

VANCOUVER 2014

21st Annual CAGP-ACPDP™ National Conference

BE INSPIRED. BUILD YOUR PASSION.
THE SKY'S THE LIMIT.

Welcome!

The desire to make the world better for future generations is what motivates those of us who work in the charitable sector as professional advisors, fundraisers and consultants. We take joy in building bridges that connect donors to their passions and create thriving, connected communities.

With educational and dynamic sessions, workshops and networking events, the 2014 CAGP-ACPDP™ Conference promises to offer more opportunities than ever to build a bridge to excellence in planned giving. The 2014 Conference will also connect CAGP-ACPDP™ members and non-members so together they can reach for the sky and elevate their impact on their work and communities.

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 develop an invaluable network of contacts, meet like-minded professionals and share personal and professional experiences and aspirations.

We look forward to welcoming you to Vancouver and helping you build your own bridge from sea to sky.


Paola Coronado Hass and ***Tom Riglar***
Co-chairs, Host Advisory Committee

2014 Host Advisory Committee

Committee Co-Chairs

Paola Coronado Hass	BC Cancer Foundation
Tom Riglar	TGR Consultants

Committee Members

Jocelyn Anderson	Ecojustice Canada Society
Yolanda Benoit	BC SPCA
Michelle Bernard	Covenant House Vancouver
Gwen Chapman	GC Consulting
Peter Chipman	Variety The Children's Charity of BC
Calvin Fong	
Jennifer Ingham	TELUS World of Science, Science World BC
Dave Magnuson-Ford	*dmf* Dream Management
Patrick McGuire	Rogers Group Financial
Glen Mitchell	Anglican Diocese of New Westminster
Amy Mortimore	Clark Wilson LLP
Janice Williams CFRE	BC Children's Hospital Foundation

2014 National Program Committee

Committee Chair

Jill Nelson CFRE	The Princess Margaret Hospital Foundation

Committee members

Ruth MacKenzie	CAGP-ACPDP™
Michelle M.B. Osborne CFRE	University of Toronto
Jo-Anne Ryan PFP	TD Canada Trust
Calvin Fong	
Maurice Prevost	University of Ottawa
Rowena Griffiths CSA	Carleton University
Janice Williams CFRE	BC Children's Hospital Foundation

BRIDGING
SEA TO SKY
APRIL 9 – 11

VANCOUVER 2014

21st Annual
CAGP-ACPDP™
National Conference

GIFT PLANNING IS A JOURNEY.

Join us and discover how to help your donors or clients find ways to give from the heart, give smart and give for impact to realize their philanthropic dreams.

THE CAGP-ACPDP™ CONFERENCE AIMS TO:

- Engage and energize gift planning professionals through an exceptional networking experience
- Build excellence in planned giving through a cutting-edge, forward-thinking education program
- Strengthen and advance the profession of gift planning with material and discussion that is relevant and appealing to professional advisors and charitable gift planners

WHY ATTEND?

- Build bridges to the people and networks that matter in the world of planned giving
- Learn about the latest and the greatest in a sea of tools, topics and trends
- Be inspired, build your passion, the sky's the limit

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

TUESDAY

8:00 – 5:00	Leaders Forum
8:00 – 5:15	Gift Planning – All in a Day
3:00 - 6:00	Conference registration open

WEDNESDAY

7:00	Registration opens / Breakfast in Exhibit Hall
8:00 – 9:00	Opening Plenary session
9:15 – 10:45	Workshop sessions
10:45 – 11:15	Refreshment break in Exhibit Hall
11:15 – 12:15	Workshop sessions
12:30 – 2:00	Lunch and Plenary Session
2:15 – 3:15	Workshop sessions
3:15 - 5:00	Welcome Reception in the Exhibit Hall
6:30	Dine Around

THURSDAY

7:00	Registration opens / Breakfast in Exhibit Hall
7:30 – 9:15	Plenary session
9:30 – 11:00	Workshop sessions
11:00 – 11:30	Refreshment break in the Exhibit Hall
11:30 – 12:30	Workshop sessions
12:30 – 2:00	CAGP-ACPDP™ Annual General Meeting
2:15 – 3:15	Workshop sessions
3:15 – 4:00	Refreshment break in the Exhibit Hall
4:00 – 5:00	Workshop sessions
6:00 – 11:00	CAGP-ACPDP™ Reception and Banquet

FRIDAY

7:00	Registration opens / Breakfast in Exhibit Hall
8:00 – 9:00	Plenary session
9:15 – 10:45	Workshop sessions
10:45 – 11:30	Refreshment break in the Exhibit Hall
11:30 – 1:00	Lunch and Closing Plenary
5:00	Optional Social Activity – Grouse Mountain

PLENARY SESSIONS

What's Ahead for Canada?

WEDNESDAY APRIL 9 8:00 AM


Kevin Lynch

The Honourable Kevin G. Lynch P.C., O.C., PH. D, LL.D, Vice Chair, BMO Financial Group

Dr. Kevin Lynch thinks leadership and innovation are key to Canada's future in a world that is changing profoundly. What are the implications for philanthropy and how can we be inventive to ensure a strong philanthropic future? As a world business leader, senior leadership volunteer, and participant in the Davos World Economic Forum, Dr. Lynch has a uniquely well-informed perspective on the global economy. Come and hear his prescription for a more competitive and dynamic future.

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Billionaires of Good Deeds

WEDNESDAY APRIL 9 12:30 PM


Joel Solomon

Joel Solomon, Chairman, Renewal Funds

When Joel Solomon and business partner Carol Newell first began investing money to foster social and environmental change, many people said they would surely fail. Now, years later, Renewal Funds has proven the viability of the social venture capital model. Joel will explore the practice of whole portfolio activation to mission that he and Carol developed. By aligning money with values, every person can invest in their community, and in the world, to become a billionaire of good deeds while both making money and investing in meaningful causes.

Sponsored By TD

Putting Humanity Back in the Modern Philanthropic Movement

THURSDAY APRIL 10 7:30 AM


Kathy LeMay

Kathy LeMay, CEO, Raising Change

Big names, big causes, big wallets. Today's modern philanthropic movement has reached epic heights, ushering in scalable solutions to modern day social ills and unleashing untold amounts of money into what is now being called the third sector. This growing emphasis on creating change for profit concepts such as return on investment, indicators of success, and business viability are making their way into the quest to transform people's lives. Do the benchmarks in the for-profit world where cash is king translate to the non-profit world where humanity is the destination and the journey? Is there still a role for humanity in this new modern philanthropic movement?

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CAGP-ACPDP™ Annual General Meeting

THURSDAY APRIL 10 12:30 PM

AGMs have a reputation for being 'less than fun', but it's an important time for the CAGP-ACPDP™ Board and its members to connect. Hear about highlights of the last year, learn about progress made on the strategic plan, ask (or sing) your questions, and of course, receive the financial report and elect the Board of Directors. A not-to-be-missed part of the 2014 conference – and not just because of the draw for a free membership!

Finding Debwewin in Your Story: A Journalist's Tale

FRIDAY APRIL 11 8:00 AM


Duncan McCue

As a reporter for CBC, Duncan McCue tells compelling stories that speak deeply of human struggle, especially those of concern to Indigenous people. Challenging the bias of mainstream media to tell stories that must be heard despite noise inherent in our world today takes well-honed journalistic skills. Duncan will share some of his stories with us, and teach us how we can sharpen our own charities' stories: to be heard, to move people to action, and thereby to create the change we strive for. You will leave this session moved, inspired, and better able to sway your own audiences.

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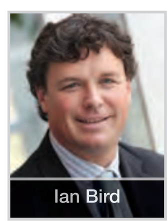
What's Next for Philanthropy?

FRIDAY APRIL 11 11:30 AM


Ian Bird

Ian Bird, President, Community Foundations of Canada

Today we operate in a world where concepts of community and philanthropy are changing rapidly. To meet the challenges and opportunities of the 21st century the state of philanthropy must evolve and adapt to better meet the needs of our communities and our nation. Sharing stories of innovation from across the philanthropic sector, including research from the Monitor Institute and examples of Smart & Caring Communities in action, Ian unpacks the ideas redefining our current philanthropic landscape and re-imagining the future of philanthropy.

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WORKSHOP TOPIC STREAMS

Having trouble choosing from the wide array of sessions? Consider what you want to get out of the conference and look for sessions that deliver. Topics are colour-coded as follows:

Gift Planning Fundamentals

Certain concepts and knowledge are essential for the qualified gift planner. If you're new to gift planning, looking for a general refresher on a certain topic, or need to take your knowledge to the next level, these will fit the bill.

- Gift Planning Overview
- Donations From Wills and Trusts
- Make it Personal: Exceed Your Fundraising Goals
- There are Many Gifts in Kind in the Sea
- Essential Tax for any Gift Planner
- Let's Face It! Bridging the Gap – Making Lasting Connections with our Donors

Be a Better Gift Planner (Professional Skills)

Arguably, any session you attend at this conference will make you a better gift planner! These sessions in particular focus on the professional skills and knowledge that take your performance to the next level.

- How HNW Donors are Using Philanthropy
- Initiating Inspired Conversations
- The Art of Persuasion
- Planned Giving Off the Side of Your Desk
- Prudent Investment Management and ESG Investments
- Building Bridges with Behavioral Styles

Managing Gift Planning

Are you the one responsible for building value in your program over the long term? These sessions and speakers address different elements of proactively managing the special challenges and opportunities of a gift planning program.

- Planned Giving Best Practices for Small Shops
- What's in a Name? Issues Associated with Donor Naming Rights
- 5 Year Planning in 5 Easy Steps
- Restricted Gifts and How to Manage Them
- Success is in the Numbers
- Can Volunteers do Planned Giving?
- Demystifying Complex Gifts by Working with Advisors
- Interesting Case Studies with Gift Arrangements and Agreements

Marketing

Finding donors and telling them about our work – how can we do it better? All these sessions set us up with the newest and best ideas for mining for donors and reaching out across many media.

- Paint by Numbers: The Ultimate Story Script for Your Case for Support
- Inside Tony's Toolbox
- Today's Digital Donor - Tomorrow's Legacy
- Predictive Analytics - Witchcraft or Wisdom
- Your Legacy Website
- Planned Giving and Annual Fund
- Bridging Planned Giving and Social Media

Donor Relations

The heart of our profession: engaging donors who care about the mission. Learn from experienced gift planners how to build rapport and relationships.

- Demystifying Planned Giving
- The Endowment Book of Life - How To Ensure Legacy Gifts
- Estates and Eddies
- The Legacy Prospects in Your Mid-Level Program
- Legacies and fMRI's
- Donor Panel

Governance/Finance

These sessions will be of particular interest to those responsible for the good governance of a charity. While many of these sessions touch on "gift planning issues" they cover a much broader spectrum and will be of particular interest to CEO's, Finance Directors, Board members and Founders.

- Planning Without Borders - Part 2 - Fundraising Internationally
- Fiduciary Best Practices: A 360° Overview of Investment Policy
- Mission Investing: Mobilizing Private Capital for Public Good
- Issues Arising from Management of Endowment Funds
- Government Relations Update
- Social Enterprise and Social Finance

Tools & Technical Expertise

At the CAGP-ACPDP™ Annual Conference you have the opportunity to learn from the top experts in Canadian Estates law. Whether you are speaking with donors about their plans, managing a gift planning program, or in charge of all forms of fundraising and governance, these sessions will help you stay on the right side of the law.

- Changes for Charities and Gift Planning under BC Estate Law
- Alter Ego Trusts/Joint Partner Trusts/Spousal Trusts
- Challenges with an Elderly Donor
- Exploring the Canadian/US Tax Implications of Gifting
- Both Sides Now - Tools from the Advisor World for Gift Planners
- Embrace Conflict: Litigation is NOT Scary!!
- Pledge Agreements: How to Make Them Stick
- The Vulnerable Donor: Practical Strategies
- Trusts and the 21 Year Rule

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

WORKSHOP SESSIONS

Learn about the latest and the greatest in a sea of tools, topics and trends

Tuesday

Pre-conference Sessions

8:00 – 5:15

Gift Planning – All in a Day

A full day of learning and networking that reviews Canadian trends and tax issues, common gifts in Canada and concludes with marketing, stewardship and discussing planned gifts with donors.

8:00 – 5:00

RoundTable / LEAVE A LEGACY™ Leaders Forum

This session is by invite only to RoundTable Chairs and LEAVE A LEGACY™ leaders. Invitations will be forthcoming from the National Office.

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Wednesday

Workshop Sessions

9:15 – 10:45

GIFT PLANNING FUNDAMENTALS

Gift Planning Overview

Introductory

This workshop will provide you with an overview of the most common gifts, refresh your understanding of the essential tools and reaffirm your knowledge of gift planning. You will leave equipped with new confidence and passion enabling you to comfortably discuss gift planning with your donors and their professional advisors.

Michelle M.B. Osborne CFRE, University of Toronto

DONOR RELATIONS

Demystifying Planned Giving - Identifying Prospects, Getting the Meeting, Having the Conversation and The Tools You Need to Succeed

Introductory

Wondering how to identify those planned giving prospects? Struggling with getting a face-to-face meeting? Finding it awkward to start or even have the conversation in the first place? What is planned giving about anyway? This lively and informative session will provide you with insights, answers and ideas on all of these issues and more. You'll obtain the tools you need to approach your planned giving donors and prospects with confidence and insight, creating a comfortable and positive opportunity for discussions to uncover your donor's potential for a planned gift.

Colleen DeJager, London Health Sciences Foundation

MARKETING

Paint by Numbers: The Ultimate Story Script for Your Case for Support

Intermediate

This is the story everyone connected to your organization should be able to tell with pride and conviction. You will leave this session with a winning formula to shape and share your Case for Support 'Story' to appeal to any of your target audiences. Whether you are preparing for a conversation with a prospect, motivating volunteers, inspiring staff or writing your comprehensive case – by following this script, you'll have an authentic and powerful story to tell.

Norma Cameron CFRE, The Narrative Company

MANAGING GIFT PLANNING

Planned Giving Best Practices for Small Shops

Intermediate

Many small shops (and some large ones!) struggle to run an efficient and effective planned giving program. In this session, Leah will provide simple tools that are guaranteed to increase planned giving revenue without breaking the bank. She will share the four criteria for pulling the best prospects from your database, the three most important marketing tools you need to have in place and the one calculator you need to make accurate projections about future revenue.

Leah Eustace CFRE, Good Works

PROFESSIONAL SKILLS

How HNW Donors are Using Philanthropy to Immunize Their Children from Affluenza and Measuring the Social Return on Their Charitable Investment

Intermediate

This session will introduce you to the "new" high net worth donor whose wealth is self made; understand their motives for giving- their fear that their children could suffer from affluenza if they inherit their parents' wealth; and the measurable impact that they want to achieve through their philanthropy both in the short and long term. Where outcomes are not as tangible or measurable, we will explore alternate methods to demonstrate impact. Stories of real life donors who fear affluenza and demand impact will be shared.

Jo-Anne Ryan PFP, TD Waterhouse Canada Inc.;
Mary Tidlund, Mary A. Tidlund Charitable Foundation

TOOLS & TECHNICAL EXPERTISE

Changes for Charities and Gift Planning under BC Estate Law: What charities need to know about the Wills, Estates and Succession Act

General

Is your charity prepared for the new Wills, Estates and Succession Act ("WESA")? Does your organization know about the changes that affect charities in estate planning, administration and litigation that will occur under this new BC legislation? Come and hear from a panel of knowledgeable lawyers about how this new legislation affects much of the estate law landscape in BC.

Michael Blatchford LL.B., Bull Housser & Tupper LLP; Andrew MacKay LL.B., Alexander Holburn Beaudin + Lang LLP; Amy Mortimore LL.B., Clark Wilson LLP

11:15 – 12:15

PROFESSIONAL SKILLS

Initiating Inspired Conversations

Intermediate

Successful gift planning is rooted in trusting relationships. Each of these relationships begins with a conversation. This session will provide the focus to initiate inspired conversations and bridge the gap between generous gifts and transformational gifts to your organization. Discover what conversations bring your mission into focus, earning the trust of the donor and earning the right to ask for that transformational gift.

Rosalie Courage, RBR Development Associates Ltd.

TOOLS & TECHNICAL EXPERTISE

Alter Ego Trusts/Joint Partner Trusts/Spousal Trusts: Uses in Estate Planning and as Vehicles for Charitable Gifting

Intermediate

This session will provide participants with a working understanding from a legal and practical perspective of what these types of trusts are and when and why they are used in estate planning and planned giving. The presentation will review the specifics of how they are established and operated, consider the advantages and disadvantages of such vehicles and explore the challenges of gifting to charities through such trusts during lifetime and after death.

M. Elena Hoffstein LL.B. and Laura E. West J.D., Fasken Martineau DuMoulin LLP

GOVERNANCE/FINANCE

Planning Without Borders - Part 2 - Fundraising Internationally

Intermediate

Canadian institutions continue to gather international clout leading to opportunities to raise funds from supporters around the world. Canadian donors are also seeking to fund international causes. This session will educate gift planners about some of the tools at their disposal and issues to overcome when raising funds from donors internationally and for Canadian donors who wish to fund global causes. The session will look at important provisions of some of Canada's tax treaties, general tax provisions and governance issues in engaging in international fundraising.

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

DONOR RELATIONS

Estates and Eddies

Intermediate

Estate administration can be exciting – just like white water paddling. Most estates are handled with kid gloves by executors and lawyers but we had to put our neoprene gloves on to steer our way through buffs and boils to receive two large estates. They both involved families with plenty of foam and we had to brace our blades to carry out the wishes of the deceased and meet the needs of the charity in a freestyle fashion.

Sheelagh M. Mercier MBA, Alberta Children's Hospital Foundation; Heather Stevens, St. Mary's University College

MARKETING

Inside Tony's Toolbox

General

No matter how small or large your planned giving program, you will pick up tried and true legacy marketing strategies at this session! The Canadian Cancer Society is one of the biggest grass-roots charities in the country, with the resources and staff to try many different legacy marketing tools and evaluate their impact. In this session Tony & Fraser will show you lots of them, and what have proven to be the most effective ways to expand their donor base.

Tony Lee, Canadian Cancer Society - Ontario Division; Fraser Green, Good Works

DONOR RELATIONS

The Endowment Book of Life - How To Ensure Legacy Gifts To Your Organization

General

Imagine if you knew how many bequests were being left to your organization. 1 % of your constituent base, 5%... The Jewish Foundation of Manitoba, through its bequest program, the Endowment Book of Life, is now aware that more than 25% of it's constituents have left a bequest. More than 700 people have confirmed that they are leaving in excess of $28 million. Through our interactive presentation and examples we hope to help your organization achieve similar results.

Marsha Cowan and David Greaves, Jewish Foundation of Manitoba

2:15 – 3:15

MANAGING GIFT PLANNING

What's in a Name? Issues Associated with Donor Naming Rights

Intermediate

Just as the granting of naming rights has become commonplace in the gift planning sector, so have the tarnished reputations of donors. Although naming rights, if documented properly, can encourage charitable giving and aid in creating enforceable gifts, they can also present a serious problem when a donor's name is no longer synonymous with a charity's values. Learn how to identify and address issues associated with naming rights as they arise in various gift planning contexts and to draft agreements that guard against being saddled with undesirable naming rights over time.

Kate Bake-Paterson LL.B., Davis LLP

GIFT PLANNING FUNDAMENTALS

Donations From Wills and Trusts
Intermediate

This session looks at donations from wills and trusts and the issues related to planning and having the donation tax credit available for the correct tax return, particularly where the estate or trust holds corporate shares.

Sandra L. Enticknap LL.B., Miller Thomson LLP

DONOR RELATIONS

The Legacy Prospects in Your Mid-Level Program
Intermediate

Can you find the planned giving prospects in your mid-level program? You've read about the mid-level program and maybe how to implement one but have you used this approach to discover all that can be found? You will learn in this workshop how to encourage the legacy donors to self identify and find a group of prospects ready to be cultivated.

Joanna Luciano CFRE, Canadian Red Cross

GOVERNANCE/FINANCE

Mission Investing: Mobilizing Private Capital for Public Good
General

The investing of private capital or assets of charitable foundations is an approach that can lead to market-based solutions to address social ills while generating strong financial returns. Mission investing is a burgeoning demand of sophisticated donors familiar with the power of investing in capital markets. How does this trend impact donors to your charity and what would your response be to questions about how your charity may invest the donations it receives? This workshop will explore the potential of mission investing as part of an overall investment policy for a charitable foundation that could lead to achieving a more robust mission outcome.

Derek Gent MBA, Vancity Community Foundation

MARKETING

Today's Digital Donor - Tomorrow's Legacy
General

All of the Facebook fans and e-mail addresses in the world won't do you any good unless you have ways to measure and improve the effectiveness of your communications in moving your audience toward a strategic goal. Integrating new technology in ways that build deeper relationships with supporters is now one of the best ways to influence outcomes. Case studies will illustrate why the use of data stands to revolutionize the non-profit sector.

Don Gordon CFRE, Dogwood Initiative

GOVERNANCE/FINANCE

Fiduciary Best Practices: A 360° Overview of Investment Policy
General

What is it? Why do we need it? What happens if we don't have it? How do we get it? This session addresses the complex dynamics and challenges facing investment fiduciaries while focusing on the fundamentals of Investment Policy Statements (IPS) and their significance as part of an overall governance system.

Sonia Park-Root CIMA®, FEA, RBC Wealth Management Canada

Thursday
Workshop Sessions
9:30 – 11:00

GOVERNANCE/FINANCE

Issues Arising from Management of Endowment Funds
Intermediate

This session will equip gift planners, allied professionals, charity managers, and board members in understanding what an endowment is in comparison to other types of charitable gifts and the special considerations that need to be taken into account in managing endowment funds. The session will include an explanation of the special investment considerations and circumstances under which an encroachment on capital can occur, circumstances under which co-mingling of endowment funds can occur, as well as an explanation of the due diligence steps that should be taken with regard to a portfolio management of existing endowment funds, as well as how to evaluate acceptance of new endowed gifts.

Terrance Carter LL.B., Carters Professional Corporation

MANAGING GIFT PLANNING

5 Year Planning in 5 Easy Steps
Intermediate

Success is 90% planning, the rest is execution. In this session you will learn five easy steps in creating a multi-year plan that will take your program to the next level. You will participate in a SWOT, data and focus group analysis, and set goals, objectives and tactics, define staffing needs, a budget, and create timelines. After this workshop, you will have the framework to create a multi-year plan for your own planned giving program.

Beth Proven CFRE, University of Manitoba

TOOLS & TECHNICAL EXPERTISE

Exploring the Canadian/US Tax Implications of Gifting
Advanced

Case Studies will be utilized to demonstrate the interaction of the Income Tax Act (Canada), Internal Revenue Code and Canada/US Tax Treaty. Various gifting scenarios will be examined: Canadian resident/US citizen gifting to a Canadian charity; Canadian resident/US citizen gifting to a US charity; Canadian resident gifting to a Canadian charity; Canadian resident gifting to a US charity; US resident/citizen gifting to a Canadian charity and US resident/citizen gifting to a US charity.

Kay Gray CGA, TEP, Grant Thornton Consulting;
Dawn Tipton, CA, CFP, TEP, Grant Thornton LLP;
Gary Tober LL.B., Garvey Schubert Barer

TOOLS & TECHNICAL EXPERTISE

Challenges with an Elderly Donor: Ensuring the Validity of the Gift
General

Capacity is not often an "on/off" switch for the elderly. The current law on determining capacity is not considered adequate, practical or modern. The British Columbia Law Institute has published a "Consultation Paper on Common-Law Tests of Capacity" and made recommendations for reform. This area of law is likely to change and those changes are likely to affect the practice of gift planners. Recent law, law reform discussions and the practical implications to the gift planning community will be discussed.

Helen H. Low LL.B. and Darrell Wickstrom LL.B., LL.M., Fasken Martineau DuMoulin LLP

PROFESSIONAL SKILLS

The Art of Persuasion

General

We are often so focused on sharing our abundant knowledge about legacy giving and all the ways to make an effective legacy gift that we sometimes neglect to focus on how best to persuade donors to consider making the gift. Those who are skilled in the art of persuasion focus more on how their material is received and interpreted, and how best to adjust their message to each audience. These skills are easily acquired and are of tremendous benefit to any fundraising professional. This session will break down these skills and we will discuss various opportunities to master the art of effective persuasion.

Susan Doyle, SD Coaching

GIFT PLANNING FUNDAMENTALS

Make it Personal: Exceed Your Fundraising Goals

General

Kathy will walk you through the creation of this crucial shift in order to meet and exceed your future goals as a fundraiser. By assessing the present, looking to the future and capturing best practices for success in relationship building in the current philanthropic climate, Kathy will walk you through a series of questions and activities that make you realize how capable you are of excelling in your position as a fundraiser.

Kathy LeMay, Raising Change

11:30 – 12:30

MANAGING GIFT PLANNING

Did We Really Agree to That? Restricted Gifts and How to Manage Them

Intermediate

It's hard to say 'no' to an opinionated, well-meaning donor offering big bucks, but the implications of taking a gift with too many strings attached can linger for, well, perpetuity. This session provides a practical overview of the legal, donor, stewardship, policy, administration and governance issues associated with restricted gifts, including endowments. Prepare to be astounded by real case studies and the collective wisdom of the other participants.

Malcolm Burrows, Scotia Private Client Group

TOOLS & TECHNICAL EXPERTISE

Both Sides Now - Tools from the Advisor World for Gift Planners

Intermediate

The world of gift planners and allied professionals are surprisingly similar yet we share so few best practices. This session will introduce you to a number of useful and practical tools used by allied professionals, as well as help you understand the outlook and mentality of allied professionals as it relates to business development.

Ryan Fraser, Freedom 55 Financial

GIFT PLANNING FUNDAMENTALS

There are Many Gifts in Kind in the Sea

Intermediate

This workshop will provide an overview of the most common gifts in kind, refresh delegates' understanding of the essential rules relating to these types of gifts and their potential pitfalls. Delegates will leave the session able to discuss knowledgeably and responsibly all of the gifts in kind in the sea.

Karen Cooper LL.B., Carters Professional Corporation

TOOLS & TECHNICAL EXPERTISE

Embrace Conflict: Litigation is NOT Scary!!

Intermediate

Need help navigating the troubled seas of litigation? This session will explain what you can expect in litigation, strategies to help maximize your outcome and deal with settlement negotiations, and background information that will help you communicate with and instruct lawyers in the most effective way. This session will be helpful for larger charities that deal with lawyers frequently as well as smaller charities that have no legal budget.

Roger Lee LL.B., Davis LLP

MARKETING

Predictive Analytics - Witchcraft or Wisdom

General

New, more affordable tools are making it possible for organizations to access analytics without breaking the bank on sophisticated software and consultants. But can predictive analytics cure all that ails an organization's direct response program. Or is it simply "snake oil" for data? Find out why predictive analytics is something we should all know more about. Learn how your organization can potentially benefit from the power of predictability.

Dean McJannet, TRICO evolution

MARKETING

Your Legacy Website: How to Help Your Planned Giving Program Respond to 21st Century Donors

General

Your charity's website is a crucial, yet often overlooked, piece of marketing collateral for your legacy program. We'll review basic web design and explore ways to help you to adapt, build and develop the right content to maximize legacy gifts – with an emphasis on charitable bequests. A series of case studies and live website reviews will be used to illustrate best practices. And as a bonus, we'll also cover how to work with committees and IT staff to bring your vision to life.

Holly Wagg CFRE, Good Works

2:15 – 3:15

MANAGING GIFT PLANNING

Success is in the Numbers

Intermediate

Go for Gold. Show success via numbers. Ensure your Board understands the real value of your work. Through a simple sequence, provide top-notch accountability to your Board in measurements they need at the leadership level. Ensure your work is valued so that your planned giving program & your professional efforts are appreciated at the highest level.

Saskia Ages, Planned Giving Canada

DONOR RELATIONS

Legacies and fMRI's - Inside the Mind of a Bequest Donor
Intermediate

Drawing on recent research by Russell James combining new fMRI neuroimaging results with experimental psychology, psychological theory, and survey research, this session explores the conscious and subconscious processes engaged in bequest decision-making. Dr. Russell is a Professor of Charitable Financial Planning at Texas Tech University. His innovative research shows just how differently the brain reacts to legacy decisions. This session will provide practical applications for gift planners and advisors that will help you improve your communications.

Natasha van Bentum CFRE, FRSA, G2 (Give Green Canada/ Patrimoine vert)

TOOLS & TECHNICAL EXPERTISE

Pledge Agreements: How to Make Them Stick
Advanced

In a world of contracts and other enforceable promises, charitable pledges have a unique history and set of legal rules. Many charitable organizations solicit pledges from donors, however if not prepared correctly, the pledge is worth no more than the paper it's written on. Learn how to draft pledges that work to create a binding promise on which your charity can rely.

Michael Blatchford LL.B. and Margaret Mason LL.B., Bull, Housser & Tupper LLP

GOVERNANCE/FINANCE

Government Relations Update
General

The Government Relations Committee plays a critical role in ensuring CAGP-ACPDP™'s voice and expertise is leveraged on key government policies of interest to the membership and which advance philanthropy in Canada. This year you'll hear from the Canada Revenue Agency on the status of recent developments and a look ahead at what charities can expect to see from the CRA. In addition, you will receive a report on the work that your Government Relations Committee is doing and an opportunity to ask questions of both CRA and the GR Committee.

Neil Cochrane, Charities Directorate, Canada Revenue Agency; Members of the CAGP-ACPDP™ Government Relations Committee

TOOLS & TECHNICAL EXPERTISE

The Vulnerable Donor: Practical Strategies for Protecting Yourself and Your Gifts
General

With some gifts, you just know there's going to be trouble. You know you need to take steps to protect yourself and the gift, but what steps are necessary? What steps are most effective? This session will focus on practical strategies for protecting you and the gifts you arrange from legal challenges. Get updates on the most recent cases and take away practical tips for identifying and dealing with vulnerable donors.

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

PROFESSIONAL SKILLS

Planned Giving Off the Side of Your Desk
General

Fundraising is a multi-tasking, multi-platform job where cash is king and fiscal goals often trump all. Where can planned giving strategy fit in an environment like this? Paul Nazareth has worked in a small shop, Canada's largest university and a faith-based team with 1.9 million donors being served by less than a dozen staff. Now as a professional advisor he gets a bird's eye view of donor interactions with charities and where opportunities are lost. We will discuss what an auto-pilot program looks like and 5 small things a charity can do to ensure more bequests even when a full time staff person is not possible.

Paul Nazareth, Scotia Private Client Group

4:00 – 5:00

PROFESSIONAL SKILLS

Prudent Investment Management and ESG Investments and How they Facilitate Large Donations
Introductory

Talking to donors about investment management of their donations is key in establishing credibility with your donors. We'll explain the return and risk factors in investment management to prepare you for meetings with donors having a sophisticated finance background so that you can bridge the communication gap and understand how to answer your donor's questions and address their needs. We'll discuss the elements of prudent investment management and strong risk management and how it facilitates large donations and bequests as donors have confidence their donations are managed to a very high investment standard. We'll also talk to you about value based investing in terms of environmental, social and governance (ESG) factors and how ESG mandates can benefit your organization and create an alignment of interests with your organization's mandate and your donor's values.

Cecil Baldry-White CIM, CFP, Alitis Investment Counsel

MARKETING

Planned Giving and Annual Fund: A Match Made in Heaven
Intermediate

In 2013, York University launched a collaboration between the Planned Giving and Annual Giving programs. By combining the best annual giving practices, including telefundraising, with the best planned giving practices this program generated significant new bequest expectancies and grew the pool of planned giving prospects. At this session you will learn how to launch a similar program at your institution.

Marisa Barlas and Mikhael Bornstein, York University

MANAGING GIFT PLANNING

Demystifying Complex Gifts by Working with Advisors
Intermediate

Complex gifts do not have to be a mystery. All gift planners and major gift officers should be able to entertain these opportunities if they have the right advisors who can assist. In this session we will share two case studies and engage a panel of advisors to identify how they are able to assist, their approach, perspectives and concerns. This session will appeal to gift planners and major gift officers from charities as well as advisors who will all learn ways to more meaningfully work together on assisting donors and clients to maximize their philanthropy.

Janice Loomer Margolis, Ecojustice; Grant Monck LL.B., Ducks Unlimited Canada; Advisor panel to be confirmed

MANAGING GIFT PLANNING

Can Volunteers do Planned Giving?
Intermediate

It started with a simple statement by a volunteer. "We need to encourage more people to remember Trent University in their wills." When all the individuals at the table nodded affirmatively, I realized they were on to something. I couldn't have imagined that these volunteers would be so eager, ambitious and willing to ask for legacy gifts. Learn how these individuals set out to more than double Trent's Legacy Society by its 50th anniversary in 2014.

Sherry Booth CFRE, Trent University

GIFT PLANNING FUNDAMENTALS

Essential Tax for any Gift Planner
General

Planned giving is the marriage between donors and financial advisors. As a development officer, you must have a good understanding of basic tax concepts in order to effectively communicate to your donors and their advisors. This session will help you develop an essential tax "vocabulary" that will help you understand the financial advisor, as well as tools and tips to more effectively communicate and give strategies to your donors. The session will be interactive and fun!

DeWayne Osborn M.P.Ed, CFP, CGA, Lawton Partners

DONOR RELATIONS

Donor Panel
General

Description unavailable at time of printing

Rowena Griffiths CSA, Carleton University

FRIDAY
Workshop Sessions
9:15-10:45

TOOLS & TECHNICAL EXPERTISE

Trusts and the 21 Year Rule – Gift Planning Opportunities
Advanced

Tax professionals frequently recommend the use of estate freezes and family trusts for their larger family-owned businesses. These same families are often our largest donors. In this session we will review the corporate structure, the tax implications and the gift planning opportunities that are available. Generational corporate planning fits beautifully with generational philanthropy planning. Learn how to have the legacy conversation with your family business owner-donors.

Brenda McEachern LL.B., TEP, Canada Life - BC Region

GOVERNANCE/FINANCE

Social Enterprise and Social Finance - What's New and What Does it Mean for Gift Planners?
Advanced

Social Enterprise and Social Finance are all the rage in Canada. New corporate forms known as Community Contribution Corporations in BC and Community Interest Corporations in Nova Scotia are being touted as the next solution to society's ills. Social Impact Bonds are being advanced by all levels of government. Do these initiatives pose a threat to charitable giving? How can we fit gift planning into this new trend in the sector? What impact does this have on gift planning? This session will highlight the changes and engage the participants in a discussion of what gift planning might look like in the future.

Susan Manwaring LL.B., Miller Thomson LLP; Charity representative to be confirmed

GIFT PLANNING FUNDAMENTALS

Let's Face It! Bridging the Gap – Making Lasting Connections with our Donors
General

Donors aren't hiding in your office under the latest copy of your fundraising newsletter. They're out there in their homes and that's where you need to be! But getting across the threshold can be a challenge. Join Peggy and Charles as they provide practical advice on arranging donor visits. They'll share observations, tips, suggestions and stories of visits gone right and visits gone wrong. You'll leave this session armed with great ideas to make the donor visit a powerful tool in your relationship management strategy.

Peggy Killeen CFRE, Royal Victoria Hospital Foundation; Charles O' Neil EPC, QEII Health Sciences Centre Foundation

MARKETING

Bridging Planned Giving and Social Media

General

Social media interacts with planned giving on three levels: 1) Legacy gifts and social media donor engagement 2) Legacy marketing in the social media space 3) Social media profiles and fundraiser/donor activity. What has been a 'nice to have' for the past few years is now a 'must have' as part of your marketing program. Attend this session to help your leadership, marketing and fundraising teams get more gifts and thank more donors.

Paola Coronado Hass, BC Cancer Foundation;
Leah Eustace CFRE, Good Works

PROFESSIONAL SKILLS

Building Bridges with Behavioral Styles

General

Some experts insist on phone calls and meetings. Other say legacy prospects only respond to mail. Who's right? They both are – to a point. It's typical to use only our own default communication style but that means we're communicating with just a quarter of our prospects. In this entertaining and informative session you will learn the four basic behavioral styles, experience your preferred style, and discover how to communicate with all those other strange birds.

Neil Williams, SAIT Polytechnic

MANAGING GIFT PLANNING

Interesting Case Studies with Gift Arrangements and Agreements

General

What is a gift agreement or arrangement? When do you need one? What do you do with it once you get it? What if you can't comply with it or have funds remaining when the purpose of the gift is complete? We live in an era where more donors want to direct their donations to specific charitable purposes, projects and activities. We'll examine cases of directed donations that have gone right and gone wrong, and the legal and donor relation issues that arise.

Elizabeth Moxham LL.B., LL.M., CFRE, Consultant

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

Speaker biographies can be found online at the CAGP-ACPDP™ website at

www.cagpconference.org

CONFERENCE SOCIAL EVENTS

Build bridges to people and networks that matter

ROUNDTABLE HOSPITALITY SPONSOR

CAGP-ACPDP™ Greater Vancouver RoundTable

EXHIBIT AREA – THE HUB OF THE CONFERENCE!

Opening Reception sponsored by: Rogers Group Financial

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.

A SEA TO SKY DINE AROUND

Wednesday April 9 6:30 PM

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

Price: various depending on restaurant

CAGP-ACPDP™ RECEPTION AND BANQUET

Thursday April 10 6:00 PM

Banquet sponsored by: Vancouver Foundation

Join us in the exhibit area for a reception, followed by dinner and high-energy entertainment with Tambura Rasa. You'll be transported beyond the sea with Spanish, African, Latin and Gypsy rhythms as you clap your hands and tap your toes to the multicultural beats of the band and their flamenco dancer.

GROUSE MOUNTAIN DINNER

Friday April 11 5:00 PM *Departure from hotel*

Take the Skyride to the top of Grouse Mountain where you'll receive a First Nations welcome and entertainment while dining in the authentic Hiwus Feasthouse atop the Mountain next to Blue Grouse Lake. A guest appearance of the Wildlife Refuge's wildlife ambassador will make for a very memorable evening.

Note: Appropriate footwear and clothing are recommended for mountaintop activities as weather conditions can change quickly. Grouse Mountain is proud to be a smoke and tobacco free environment.

Price: $75.00 (plus GST)

Deadline to book: February 24, 2014

GENERAL INFORMATION

ACCOMMODATIONS

The Sheraton Vancouver Wall Centre Hotel
1088 Burrard St.
Vancouver, BC V6Z 2R9
Reservations: 1-800-663-9255

Room Rates: Single or double room: $160 (plus applicable taxes and fees) per night. Mention the CAGP-ACPDP™ conference to receive this preferred rate or book directly through the customized web reservations page for conference rates.

Deadline to book: After March 7, 2014 the special conference rates and rooms are not guaranteed

TRAVEL INFORMATION AND DISCOUNTS

By Air
Vancouver's airport is approximately a 30-45 minute drive from the Sheraton Wall Centre Hotel. The Airport has daily direct and non-stop flights from Canada and the United States.

Taxi Service from Airport
Rates: approximately $34 - $36 CDN (taxes included) one-way between the airport and downtown Vancouver.

WestJet Travel Discount for CAGP-ACPDP™ Delegates
10% discount off the airline's best available Flex fare at the time of booking (excluding seat sales and web fares). Please call the WestJet Groups Department to reserve.
Availability: Discounted rates are available up to 7 days prior and 7 days after the conference dates.
Booking code: CC5426
Reservations: 1-888-493-7853

BURSARY SUPPORT

Bursaries are available to cover the cost of conference registration. A bursary application form and guidelines are on the CAGP-ACPDP™ conference website at **www.cagpconference.org**. Applications must be received by January 27, 2014.

QUESTIONS?

Tel: 1-888-430-9494 / 613-232-7991 x222
Email: **conference@cagp-acpdp.org**
Website: **www.cagpconference.org**

CONFERENCE TWITTER TEAM

Join the CAGP-ACPDPTM volunteer tweeters at #CAGP2014.

FOLLOW US ON

REGISTRATION INFORMATION

To register visit our secure registration site at www.cagpconference.org

CONFERENCE REGISTRATION FEES Note: GST is not included in fees	Early Bird (Until Feb 21, 2014)	Regular (After Feb 21, 2014)
Full Conference Fees		
Member*:	$775	$875
Non-member:	$1024	$1137

**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	

*(*one Thursday banquet ticket is included in the full conference registration fee)*

Gift Planning-All in a Day Pre-conference - April 8 | 8:00 AM – 5:15 PM		
Member:	$315	$315
Non-member:	$350	$350

Optional Social Activity – booking deadline February 24
April 11 | 5:00 PM

Grouse Mountain and Dinner:	$75.00	

Full Conference registration includes:
- all plenary and workshop sessions
- continental breakfast and lunch Wednesday, Thursday and Friday
- Wednesday Opening Reception; CAGP-ACPDP™ Banquet Thursday
- pre- and post-conference web access to all PowerPoint presentations (as released for inclusion)

Payment
Please make your cheque payable to CAGP Vancouver 2014. Payment may also be made by Visa or Mastercard®. GST is not included in fees.

Cancellation and Refund Policy
Notice of all cancellations must be received in writing. Before March 7 2014, if you must cancel your registration, three options are available:

1) Your registration may be transferred to a colleague within your organization;
2) Your registration may be carried forward for you to attend the 2015 conference;
3) Your fees may be refunded (less a $200.00 Administration Fee)

There will be no refunds, carry-forwards, or transfers of cancelled registrations after March 7 2014.
No-shows forfeit the full registration fee.

Register online at: www.cagpconference.org

WORKSHOP SESSION SIGN-UP FORM

BRIDGING SEA TO SKY
APRIL 9 – 11
21st Annual CAGP-ACPDP™ National Conference

JOINDRE LA MER AU CIEL
DU 9 AU 11 AVRIL
21e Congrès national annuel de la CAGP-ACPDP^MD

VANCOUVER 2014

Please indicate your first (1) and second (2) choice of session per timeslot, as space is limited.

First Name

Last Name

(   )
Telephone

E-mail

WEDNESDAY APRIL 9 9:15 - 10:45

- ☐ Gift Planning Overview (Introductory)
- ☐ Demystifying Planned Giving (Introductory)
- ☐ Paint by Numbers: The Ultimate Story Script (Intermediate)
- ☐ Planned Giving Best Practices for Small Shops (Intermediate)
- ☐ How HNW Donors are Using Philanthropy (Intermediate)
- ☐ Changes for Charities under BC Estate Law (General)

WEDNESDAY APRIL 9 11:15 - 12:15

- ☐ Initiating Inspired Conversations (Intermediate)
- ☐ Alter Ego/Joint Partner/Spousal Trusts (Intermediate)
- ☐ Planning without Borders (Intermediate)
- ☐ Estates and Eddies (Intermediate)
- ☐ Inside Tony's Toolbox (General)
- ☐ The Endowment Book of Life (General)

WEDNESDAY APRIL 9 2:15 - 3:15

- ☐ What's in a Name? Issues with Donor Naming Rights (Intermediate)
- ☐ Donations from Wills and Trusts (Intermediate)
- ☐ Legacy Prospects in Your Mid-Level Program (Intermediate)
- ☐ Mission Investing (General)
- ☐ Today's Digital Donor-Tomorrow's Legacy (General)
- ☐ Fiduciary Best Practices (General)

THURSDAY APRIL 10 9:30 - 11:00

- ☐ Issues Arising from Endowment Funds (Intermediate)
- ☐ 5 Year Planning in 5 Easy Steps (Intermediate)
- ☐ Exploring Canadian/US Tax Implications (Advanced)
- ☐ Challenges with an Elderly Donor (General)
- ☐ The Art of Persuasion (General)
- ☐ Make it Personal: Exceed Your Fundraising Goals (General)

THURSDAY APRIL 10 11:30 - 12:30

- ☐ Did We Really Agree to that? Restricted Gifts (Intermediate)
- ☐ Both Sides Now-Tools from the Advisor (Intermediate)
- ☐ There are Many Gifts in Kind in the Sea (Intermediate)
- ☐ Embrace Conflict: Litigation is not Scary (Intermediate)
- ☐ Predictive Analytics-Witchcraft or Wisdom (General)
- ☐ Your Legacy Website (General)

THURSDAY APRIL 10 2:15 - 3:15

- ☐ Success is in the Numbers (Intermediate)
- ☐ Legacies and fMRI's (Intermediate)
- ☐ Pledge Agreements (Advanced)
- ☐ Government Relations Update (General)
- ☐ The Vulnerable Donor (General)
- ☐ Planned Giving Off the Side of Your Desk (General)

THURSDAY APRIL 10 4:00 - 5:00

- ☐ Prudent Investment Management (Introductory)
- ☐ Planned Giving and Annual Fund (Intermediate)
- ☐ Demystifying Complex Gifts (Intermediate)
- ☐ Can Volunteers do Planned Giving? (Intermediate)
- ☐ Essential Tax for Any Gift Planner (General)
- ☐ Donor Panel (General)

FRIDAY APRIL 11 9:15 - 10:45

- ☐ Trusts and the 21 Year Rule (Advanced)
- ☐ Social Enterprise and Social Finance (Advanced)
- ☐ Let's Face it! Lasting Connections with Donors (General)
- ☐ Bridging Planned Giving and Social Media (General)
- ☐ Building Bridges with Behavioural Styles (General)
- ☐ Interesting Case Studies-Gift Arrangements & Agreements (General)

Please return this form to the CAGP-ACPDP™ National office:
1188 Wellington Street West, Suite 201
Ottawa, ON K1Y 2Z5
Fax: 613-232-7286
E-mail: conference@cagp-acpdp.org

CONFERENCE REGISTRATION FORM

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APRIL 9 – 11
VANCOUVER 2014
21st Annual CAGP-ACPDP™ National Conference

JOINDRE LA MER AU CIEL
DU 9 AU 11 AVRIL
21e Congrès national annuel de la CAGP-ACPDP MD

To register on-line go to: www.cagpconference.org

To register by mail or fax, please complete both sides of this form and send together with payment to:

CAGP-ACPDP™ Conference
1188 Wellington Street W., Suite 201 Ottawa, ON K1Y 2Z5
Tel: (613) 232-7991 or (888) 430-9494 x 222 Fax: (613) 232-7286
E-mail: conference@cagp-acpdp.org

DELEGATE INFORMATION

First Name | Last Name | Designation(s)

Job Title | Organization

Address

City | Prov | Postal Code

( ) Telephone | E-mail

Special dietary or mobility requests

EMERGENCY CONTACT INFORMATION

Contact Name

( ) Day Phone | ( ) Night Phone

☐ I have my CFRE

☐ This is my first CAGP-ACPDP™ Conference

☐ I would like to volunteer to moderate a session at the conference

☐ I do not grant permission to CAGP-ACPDP™ to publish my contact information, as listed above, in the conference delegate list made available to attendees and sponsors.

I will attend the Thursday night banquet: ☐ Yes ☐ No

CONFERENCE REGISTRATION FORM

CONFERENCE REGISTRATION FEES	EARLY BIRD (Until Feb 21, 2014)	REGULAR (After Feb 21, 2014)	
Full Conference Fees			
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Optional Social Activity – booking deadline February 24

Grouse Mountain & Dinner *(Friday April 11 5:00)*	tkts x $75.00	$
Extra Thursday banquet ticket*:	tkts x $119	$

**one Thursday banquet ticket is included in the full conference registration fee*

Subtotal Conference Fees	$	A
5% GST Registration number: 870678299RT0001	$	B
Processing Fee	$ 5.00	C
Total Conference Fees (Total A, B, C)	$	

PAYMENT OPTIONS

☐ VISA ☐ MasterCard® ☐ Cheque (payable to CAGP Vancouver 2014)

Credit Card number

Expiry date

Name on card

☐ I authorize payment for total conference and activity fees by credit card

Cardholder Signature

Cancellation and Refund Policy

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Tel: (613) 232-7991 or (888) 430-9494 x 222 Fax: (613) 232-7286
E-mail: conference@cagp-acpdp.org **www.cagpconference.org**