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™

AN EDUCATIONAL CONFERENCE FOR
GIFT PLANNERS, FUNDRAISERS AND
PROFESSIONAL ADVISORS.
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The organizations listed were confirmed at time of printing.
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

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**2014 Host Advisory Committee**

**Committee Co-Chairs**  
Paola Coronado Hass  
Tom Riglar

**Committee Members**  
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Yolanda Benoit  
Michelle Bernard  
Gwen Chapman  
Peter Chipman  
Calvin Fong  
Jennifer Ingham  
Dave Magnuson-Ford  
Patrick McGuire  
Glen Mitchell  
Amy Mortimore  
Janice Williams CFRE

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Jill Nelson CFRE

**Committee members**  
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Michelle M.B. Osborne CFRE  
Jo-Anne Ryan PFP  
Calvin Fong  
Maurice Prevost  
Rowena Griffiths CSA  
Janice Williams CFRE

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Covenant House Vancouver  
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Variety The Children’s Charity of BC  
TELUS World of Science, Science World BC  
dmf Dream Management  
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Clark Wilson LLP  
BC Children’s Hospital Foundation  
The Princess Margaret Hospital Foundation  
CAGP-ACPDP™ University of Toronto  
TD Canada Trust  
University of Ottawa  
Carleton University  
BC Children’s Hospital Foundation
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

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**CONFERENCE SCHEDULE AT-A-GLANCE**

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<th>DAY</th>
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<th>Events</th>
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<tr>
<td>TUESDAY</td>
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<td>Leaders Forum</td>
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<td>8:00 – 5:15</td>
<td>Gift Planning – All in a Day</td>
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<td>3:00 - 6:00</td>
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<td>12:30 – 2:00</td>
<td>Lunch and Plenary Session</td>
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<td>3:15 - 5:00</td>
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<td>12:30 – 2:00</td>
<td>CAGP-ACPDP™ Annual General Meeting</td>
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<td>4:00 – 5:00</td>
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<td>6:00 – 11:00</td>
<td>CAGP-ACPDP™ Reception and Banquet</td>
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<td>FRIDAY</td>
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<td>Lunch and Closing Plenary</td>
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PLENARY SESSIONS

What’s Ahead for Canada?
WEDNESDAY APRIL 9 8:00 AM

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.

Sponsored By

Billionaires of Good Deeds
WEDNESDAY APRIL 9 12:30 PM

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

Putting Humanity Back in the Modern Philanthropic Movement
THURSDAY APRIL 10 7:30 AM

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?

Sponsored By

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

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.

Sponsored By

What’s Next for Philanthropy?
FRIDAY APRIL 11 11:30 AM

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-imaging 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 IMRs
- 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

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.

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.

Wednesday
Workshop Sessions

Gift Planning Overview
Intermediate
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

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

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

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

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

MARKETING

STRONGER COMMUNITIES TOGETHER™
**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.

*M. Elena Hoffstein LL.B. and Laura E. West J.D., Fasken*

**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*

**GEOMETRY/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 Aptowitz LL.B. and C. Yvonne Chenier Q.C., Drache Aptowitz 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 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 its 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*
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 capital markets. How does this trend impact donors to your charity and what would your response be to questions about capital markets? This session 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

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

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

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

Exploring the Canadian/US Tax Implications of Gifting
Advanced
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
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)

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

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

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

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

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
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

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

DONOR RELATIONS

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

BRIDGING SEA TO SKY
CAGP-ACPDP™ Conference • April 9 – 11
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.
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-ACPDP™ volunteer tweeters at #CAGP2014.

Follow us on  

ICON
## Registration Information

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

### Conference Registration Fees

Note: GST is not included in fees

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*Thursday evening banquet ticket not included

| Extra Thursday banquet ticket* | $119 |

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

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

**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 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)
# CONFERENCE REGISTRATION FORM

To register on-line go to: [www.cagpconference.org](http://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

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- 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

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E-mail: conference@cagp-acpdp.org  
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PREMIER CONFERENCE SPONSOR  
RBC Wealth Management
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### Subtotal Conference Fees

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### 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

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At RBC Wealth Management, we are proud to foster meaningful change in our communities, and to help our clients envision a brighter future.

To learn more, please visit www.rbcwealthmanagement.com.