



SET YOUR SAILS

Explore. Dream. Discover.

CAGP-ACPDP™ Conference
April 18-20, 2012 | Victoria, BC

19th Annual National CAGP-ACPDP™ Conference

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

Premier Conference Sponsor:



RBC Wealth Management

Celebrating 15 years in partnership with CAGP-ACPDP™



EXPLORE. DREAM. DISCOVER.

SET YOUR SAILS FOR VICTORIA!

Dear Colleagues,

Many of us work or serve in the charitable sector because we are driven by a passion to change the world - in our own neighbourhood or across the globe.

At this year's conference, we want to raise awareness about leaving a legacy and encourage philanthropy in our community. Whether you are a new or seasoned fundraiser, professional advisor, board member or financial officer of a charity, this conference will provide sessions at all levels and plenary sessions to inspire.

Gift planning is a journey: discovering new knowledge and new experiences and sharing stories of life's passions and dreams. We look forward to welcoming you as you explore, dream and discover how to help donors and clients find ways to let their values live on.

Until we meet in Victoria,



Sara Neely LL.B., CFRE
2012 Host Advisory Committee Chair

*"Twenty years from now you will be more disappointed by the things that you didn't do than by the ones you did do. So throw off the bowlines. Sail away from the safe harbour. Catch the trade winds in your sails. **Explore. Dream. Discover.**" Mark Twain*

2012 HOST ADVISORY COMMITTEE

Committee Chair

Sara Neely LL.B., CFRE Victoria Foundation

Committee Members

Joy Spencer Barry Philanthropy Advisor,
Project Management

Natasha Benn University of Victoria

Norma Cameron CFRE The Narrative Company

Patrick Corrigan Pacific Opera Victoria

Trudy Farrell Consultant

Calvin Fong Vancity Community
Foundation

Carla Funk First Peoples' Heritage,
Language and Culture
Council

Jennifer Jasechko CFRE Jennifer Jasechko Consulting

Paul Longtin Royal Roads University

Dawn Tipton CA, CFP Grant Thornton LLP

Barbara Toller CFRE CanAssist, University of
Victoria

2012 NATIONAL PROGRAM COMMITTEE

Committee Chair

Jill Nelson CFRE The Princess Margaret
Hospital Foundation

Committee Members

Norma Cameron CFRE The Narrative Company

Calvin Fong Vancity Community
Foundation

Sara Neely LL.B., CFRE Victoria Foundation

Michelle M.B. Osborne CFRE University of Toronto

Jo-Anne Ryan PFP TD Waterhouse

M. Jasmine Sweatman J.D.,
LL.M, TEP, C.S., EPC, CPCA Sweatman Law Firm

Dawn Tipton CA, CFP Grant Thornton LLP

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We wish to recognize and thank all of our sponsors:

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The organizations listed were confirmed at time of printing.

CONFERENCE SCHEDULE

WHO SHOULD ATTEND?

Whether you are a new or seasoned fundraiser, professional advisor, board member or financial officer of a charity, this conference has something for you.

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

PRE-CONFERENCE EVENT TUESDAY APRIL 17

Gift Planning - All in a Day 8:00 – 5:00

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.

SPECIAL CONFERENCE WORKSHOPS FOR PROFESSIONAL ADVISORS FRIDAY APRIL 20

Half-Day Professional Advisors Session
7:00 – 1:00

Join us for breakfast and lunch and choose from the workshop sessions available on Friday - many of which will be of specific interest to Professional Advisors. Some sessions pre-qualify for Advocis CE credits.

VICTORIA IN THE SPRING: MORE GREEN THAN EVER...

When you arrive in Victoria in April, Mother Nature will be fully dressed to greet you in beautiful shades of green. We've decided to follow her example and make our conference as "green" as possible and leave only the lightest of carbon footprints behind. Watch for ways you can contribute to the greening of our conference in the coming months.

TUESDAY

8:00 - 5:00

Gift Planning All in a Day

8:00 - 5:00

Leaders Forum

11:30 - 9:00

Registration open in Fairmont Empress lobby

WEDNESDAY*

7:00

Registration opens / Breakfast

8:00 – 9:00

Opening Plenary session

9:15 – 10:45

Workshop sessions

10:45 – 11:15

Refreshment break

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

Optional Social Activity - The Bard & Banker

THURSDAY*

7:00

Registration opens / Breakfast

8:00 – 9:00

Plenary session

9:15 – 10:45

Workshop sessions

10:45 – 11:15

Refreshment break in the Exhibit Hall

11:15 – 12:15

Workshop sessions

12:30 – 2:00

CAGP-ACPDPT™ Annual General Meeting and Toolbox Lunch

2:00 – 3:00

Workshop sessions

3:15 – 3:45

Refreshment break in the Exhibit Hall

3:45 – 4:45

Workshop sessions

6:00 – 11:00

CAGP-ACPDPT™ Reception and Banquet

FRIDAY*

7:00

Registration opens / Breakfast

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

6:45

Optional Social Activity – Pacific Opera Victoria

*Conference sessions are held in the Victoria Conference Centre



REGISTRATION INFORMATION

REGISTRATION

To register, complete the registration and session sign-up forms or visit our secure registration site at www.regonline.com/CAGP2012.

CONFERENCE LOCATION

Fairmont Empress Hotel and Victoria Conference Centre. Pre-conference sessions will be at the Fairmont Empress Hotel and all conference sessions, Wednesday to Friday, are at the Victoria Conference Centre.

CONFERENCE REGISTRATION FEES

Note: HST is not included in fees

	Early Bird (Until Feb 24, 2012)	Regular (After Feb 24, 2012)
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FULL CONFERENCE FEES

Member or Gold Associate*:	\$710	\$820
Non-member:	\$999	\$1112

* In order to benefit from the "member rate", you need to be a member in good standing while attending the conference

ONE DAY FEES

Wednesday	\$325	\$425
Thursday*	\$325	\$425

* Thursday banquet ticket not included

HALF-DAY FOR PROFESSIONAL ADVISORS

(Fee applies only if attending this session and not the full conference)

Friday 7:00 – 1:00	\$250	\$250
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GIFT PLANNING-ALL IN A DAY

PRECONFERENCE - APRIL 17 8:00 – 5:00

Member or Gold Associate:	\$215	\$215
Non-member:	\$270	\$270

OPTIONAL SOCIAL ACTIVITIES BOOKING DEADLINE APRIL 2

(Not included in the conference fees)

The Bard and Banker:	\$45
Pacific Opera Victoria:	\$67
Extra Thursday banquet ticket*:	\$103

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

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 Victoria 2012. Payment may also be made by Visa or MasterCard®. HST is not included in fees.

CANCELLATIONS

Cancellations must be received in writing and are subject to a \$200.00 administration fee. **There will be no refunds for cancellations received after March 16, 2012.** No shows forfeit the full registration fee. Substitutions are accepted from the same organization. The cancellation fee can be used as a credit towards the next year's conference for the registered person or their organization.

BURSARY SUPPORT

Bursaries are available to cover the cost of conference registration. A bursary application form and guidelines are on the CAGP-ACPDP™ website at www.cagp-acpdp.org. Applications must be received by February 3, 2012.

*"Of course we all have our limits,
but how can you possibly find your
boundaries unless you explore as far and
as wide as you possibly can. I would
rather fail in an attempt at something
new and uncharted than safely succeed
in a repeat of something I have done."*

A. E. Hotchner

Register online at: www.regonline.com/CAGP2012

GENERAL INFORMATION

ACCOMMODATIONS

The Fairmont Empress
721 Government St.

Reservations: 250-384-8111/ 1-800-441-1414

Web Reservations: <https://resweb.passkey.com/go/giftplanners>

Room Rates:

Single or double room: \$169.00 (plus applicable taxes and fees) per night. Mention the CAGP-ACPDTM conference to receive this preferred rate.

Deadline to book: After March 17, 2012 the conference room rate and hotel rooms are not guaranteed.

BOOK TO WIN!

If you book by March 17th at the Fairmont Empress as part of the CAGP-ACPDTM conference, you will be eligible to win a complimentary Fairmont room or an upgrade to a Harbour View Deluxe room.

TRAVEL DISCOUNTS

WestJet: 10% discount off the airline's best available regular fare at the time of booking (excluding web and promotional fares). Please call the WestJet Conference Department to make reservations.

Booking code: CC5426

Reservations: 1-877-952-4696

TOURISM VICTORIA AND VANCOUVER ISLAND

Extend your stay in beautiful Victoria and Vancouver Island. Tourism Victoria and Vancouver Island Region have information on planning your vacation. www.tourismvictoria.ca and www.vancouverisland.travel.

DRESS CODE

Dress is business casual for the conference. Thursday night's banquet is business attire.

EDUCATION CREDITS

Workshops are eligible for education credits for Advocis, CGA and CFRE. Contact the CAGP-ACPDTM National Office by email at education@cagp-acpdp.org for further information.

SESSION HANDOUTS AND SPEAKER PRESENTATIONS ONLINE

Speaker handouts are available pre- and post-conference on the CAGP-ACPDTM website. Access is password protected and registered delegates will receive a password once presentations become available.

Delegates may print handouts prior to the conference from the CAGP-ACPDTM website and will be able to print handouts at the conference.

SIMULTANEOUS INTERPRETATION

One workshop session room will be set up for simultaneous interpretation. The service is available for all sessions in this room.

SPONSORSHIP OPPORTUNITIES

The CAGP-ACPDTM conference is the only one of its kind in Canada that brings together fundraisers and professional advisors. It is an excellent opportunity to showcase your products, services and programs; to network with key contacts in the charitable and professional advisor sectors and to learn more about the gift planning field in Canada.

For details about the Exhibit Area or sponsoring one of the many social and educational components, please contact the CAGP-ACPDTM conference Office at 1-866-296-5882.

QUESTIONS?

CAGP-ACPDTM National Office
325 Dalhousie St., Ste. 201
Ottawa, ON K1N 7G2
Tel: 613-232-7991 or 1-888-430-9494
Fax: 613-232-7286
Email: conference@cagp-acpdp.org
Website: www.cagp-acpdp.org

Register online at: www.regonline.com/CAGP2012

Please note: speakers and program are subject to change.

*"You gotta have a dream. If
you don't have a dream, how
you gonna make a dream
come true (South Pacific)."*

Oscar Hammerstein, II

PLENARY SESSIONS



Warren Te Brugge

Wednesday April 18 8:00

LIVING YOUR PURPOSE; LEAVING YOUR FOOTPRINT

For Warren Te Brugge, Founder and Chairman of My Arms Wide Open, changing the world involves changing the current model of philanthropy. He believes that short-term gifts don't create permanent change or reduce dependence on aid. A global businessman, Warren will share his personal story and provide insights on meeting the long-term needs of communities and leaving heart-driven legacies.

Sponsored by:



Frank Minton

Wednesday April 18 12:30

READING THE TEA LEAVES

Enjoy your own Victorian tea luncheon while you join Frank Minton and Malcolm Burrows and learn how the history and growth of tea depicts a stable international commodity, a continuum - much like gift planning. During the conversation, Frank and Malcolm will read the tea leaves to determine the trends in gift planning and how to respond to them.

Sponsored by:



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Malcolm Burrows



Mary A. Tidlund

Thursday April 19 8:00

WOMEN AND PHILANTHROPY

Women are becoming a powerful force in philanthropy and there is a great potential for charities to tap into the opportunities presented by this evolution. Not only do women wield tremendous influence within the family regarding donations, they are also accumulating personal wealth through their professional lives and from inherited and intergenerational transfers. Mary Tidlund, President of the Mary A. Tidlund Charitable Foundation and a passionate philanthropist herself, will discuss how to engage women in philanthropy.

Sponsored jointly by:



Tim Draimin

Friday April 20 8:00

SOCIAL FINANCE - TACKLING SOCIAL & ENVIRONMENTAL PROBLEMS

Social finance is a burgeoning approach to capital markets investing that is providing an innovative hybrid complement to traditional donating to a non-profit. How does this work? And what does it mean for the continued support of your charity and others? In this plenary, well-known social change agent Tim Draimin of Social Innovation Generation (SIG), explores social finance as a market-based solution for donors seeking additional avenues to promote change and non-profit sustainability.

Sponsored by:



Friday April 20 11:30

DONOR PANEL

A perennial favourite, this panel provides valuable insights from the donor point of view. Through stories, donors will share their views on their relationship with their chosen charities and advisors and who they look to for guidance as they plan their legacy.

WORKSHOP SESSIONS

TUESDAY PRE-CONFERENCE SESSIONS

8:00 – 5:00

Gift Planning – All in a Day

INTRODUCTORY

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.

Sponsored by:



STRONGER COMMUNITIES TOGETHER™

WEDNESDAY WORKSHOP SESSIONS

For workshop session descriptions, visit www.cagp-acpdp.org

9:15 – 10:45

Gift Planning Technical Overview

INTRODUCTORY

Brad Offman, Mackenzie Financial

Becoming Spiderman – Managing the Tangled Relationship Web (Estate Administration)

INTERMEDIATE

Melanie Brooks, Dolores McCauley MTI, Linda Netherton JD, CFRE, Heart & Stroke Foundation of BC & Yukon; Roger Lee LL.B., Davis LLP

Social Enterprises: Part 1 Overview

ADVANCED

David Lepage, Enterprising Non-Profits; Elizabeth Loughheed Green, Vancity Community Foundation; Susan Manwaring LL.B. and Kate Lazier LL.B., Miller Thomson LLP

Sponsored by: Phillips, Hager & North Investment Management Ltd.

Building Your Case Through the Donor's Eyes



GENERAL

Helen DeBoer-Daggett, The Hilborn Group

Explore your Personal Narrative & Discover the Art of Authentic Conversations

GENERAL

Norma Cameron CFRE, The Narrative Company

Sponsored by: Gryphon Consulting

11:15 – 12:15

Tips & Templates – Working your Legacy Program

INTRODUCTORY

Peter Chipman BBA, CFRE, Variety - The Children's Charity of BC

Life Insurance

INTERMEDIATE

Alain Lévesque, DeVimy Group

Foundations and Endowments as Gift Planning Tools

INTERMEDIATE

Ron Kelly, PlanGiv Capital Ltd.

Social Enterprises: Part 2 Panel Discussion

ADVANCED

David Lepage, Enterprising Non-Profits; Elizabeth Loughheed Green, Vancity Community Foundation; Susan Manwaring LL.B. and Kate Lazier LL.B., Miller Thomson LLP

Sponsored by: G2 Give Green Canada (Patrimoine vert)

Ensure Your Piece of the Pie with Superlative Donor Care



GENERAL

Gwen Chapman, Independent Fundraising Consultant

WORKSHOP SESSIONS

2:15 – 3:15

Demystifying the Gift Planning Conversation

Linda Pearson MBA, MA, Queen's University

INTRODUCTORY

From Here to Forever- Building Endowment Gifts

Karen Good, Edmonton Community Foundation

INTERMEDIATE

How to Train Your Dragon: Mastering Data

Beth Proven CFRE, CIM, University of Manitoba

INTERMEDIATE

Exploring the Canadian/U.S. Tax Implications of Gifting

Kay Gray CGA, TEP and Dawn Tipton CA, CFP, Grant Thornton LLP; Akane R. Suzuki J.D., LL.M., Garvey Schubert Barer

ADVANCED

Sponsored by: Grant Thornton LLP

High Net Worth Clients: One Size Does Not Fit All!

Jo-Anne Ryan PFP, TD Waterhouse



GENERAL

“We must dare to think unthinkable thoughts. We must learn to explore all the options and possibilities that confront us in a complex and rapidly changing world.”

William Fullbright

THURSDAY WORKSHOP SESSIONS

For workshop session descriptions, visit www.cagp-acpdp.org

9:15 – 10:45

The Straight Goods on Receipting Bequests

Moderator: Malcolm D. Burrows, Scotia Private Client Group; Panelists: Laurie Palmer TEP, Scotiatrust; Shelagh Rinald CA, CFP, TEP, Rinald Tax Advisory Inc.; Isabela Zabava LL.B., BC Cancer Foundation

INTERMEDIATE

Essential Charity Law Update

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

INTERMEDIATE

Numbers That Count: Performance Metrics and Analytics

Malcolm Berry MBA, SickKids Foundation; Doug Puffer, Simon Fraser University; Simon Trevelyan, S.T. Legacy Group



INTERMEDIATE

Ethical Considerations in Gift Planning

Ian M. Fraser MBA, FAHP, PlanGiv

Sponsored by: Sweatman Law Firm

INTERMEDIATE

Seeing the Person Behind the Resume

Christoph Clodius, KCI (Ketchum Canada Inc.); Sarah Nelems, Lester B. Pearson United World College of the Pacific

ADVANCED

Planning and Giving for the High Net Worth Individual and their Families: An Inspired Approach

Mike Skrypnek AIFP, Richardson GMP Limited

ADVANCED

 = Translated

11:15 – 12:15

Testamentary Gift Planning: Considerations, Options and Strategies

INTERMEDIATE

Laura West J.D., Fasken Martineau DuMoulin LLP

Business Succession Planning & Legacy Planning

ADVANCED

Brenda McEachern LL.B., TEP, Canada Life

20 Great Places for Narrative in Your Planned Giving Program

GENERAL

Leah Eustace, Good Works

Designer Endowments



GENERAL

Christine Basque, Canadian Breast Cancer Foundation, BC/Yukon Region;
Leslie Howard PFP, Planforgifts.com

Whose Role is it Anyway? The Effective Gift Planning Team

GENERAL

Dree Thomson-Diamond ACFRE, DTD Consulting

Marketing Drives Growth for Your Organization

GENERAL

J. Andrew Flynn EMBA, T.E. Wealth

Sponsor Demonstration – Gift Planning Templates & Tools

GENERAL

Tara Gish, Gryphon Consulting

2:00 – 3:00

The Anatomy of a Lawsuit

INTRODUCTORY

Mark S. Weintraub LL.B., Clark Wilson LLP

Human Dimensions – Talking about Death and Dying

INTERMEDIATE

Speaker to be confirmed

Is the Internet Losing You Gifts?



INTERMEDIATE

Paul Nazareth, Scotia Private Client Group

Donor Rights and Remedies

INTERMEDIATE

Theresa L.M. Man LL.B., Carters Professional Corporation

Donations of Land to Registered Charities in Canada

INTERMEDIATE

Sandra Enticknap LL.B., Miller Thomson LLP; Grant Monck LL.B., Ducks Unlimited Canada

I Wanted to Give Back

GENERAL

Rowena Griffiths CSA, Carleton University; The Honourable Hugh F. Landerkin QC, LL.B., M.J.S.,
The Provincial Court of Alberta and Royal Roads University

Sponsor Demonstration - Strengthening Donor Confidence During Turbulent Times

GENERAL

Jack Jamieson, T.E. Wealth

*“Without goals, and plans to reach them, you are
like a ship that has set sail with no destination.”*

Fitzhugh Dodson

WORKSHOP SESSIONS

3:45 – 4:45

Out of the Cold – Turn Your Lists to Visits

INTRODUCTORY

Carla Funk, First Peoples' Heritage, Language and Culture Council; Marnie Hill CFRE, Canadian Red Cross

Building Productive Relationships between Professional Advisors and Charities

INTERMEDIATE

Colleen DeJager TEP, London Health Sciences Foundation; Ryan Fraser CFP, CIM, Freedom 55 Financial; Sue Hardy CFRE, St. Joseph's Health Care Foundation

When to Issue Charitable Receipts and Other Mysteries

ADVANCED

M. Elena Hoffstein LL.B., Fasken Martineau DuMoulin LLP

Tools You Require to Set Sail - Top Ten Things Donors are Asking



GENERAL

Michelle M.B. Osborne CFRE, University of Toronto

Grooming Yourself as the Non-profit Leader of Tomorrow

GENERAL

Deborah Legrove CFRE, crawfordconnect

CAGP-ACDPD™ Government Relations Update

GENERAL

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

FRIDAY WORKSHOP SESSIONS

For workshop session descriptions, visit www.cagp-acdpd.org

9:15 – 10:45

Opportunities Abound - Gifts from the Neglected Mid-income Canadian

INTERMEDIATE

Dee Govang CFP, Investors Group Financial Services Inc.

Sponsored by: Investors Group

Tracking Planned Giving Activity and Results

INTERMEDIATE

Paola Coronado, BBA; Alyson M. Murzsa MSc. and Isabela Zabava LL.B., BC Cancer Foundation

Introduction to Gifts from Private Companies – A Gift Worthy of Your Consideration

INTERMEDIATE

DeWayne Osborn M.P.Ed, CFP, CGA, Lawton Partners Financial Planning Services Ltd.

Recent Legislative and Policy Changes: The Implications for Charitable and Not-for-Profit Boards



GENERAL

Sophia Dunkley LL.B., Sweatman Law Firm

Sponsored by: Phillips, Hager & North Investment Management Ltd.

Beyond Bequests: Tools and Tips for Planned Givers

GENERAL

Mark Horne Q.C.; Fiona Hunter LL.B., LL.M., T.E.P. and Donovan Waters Q.C., F.R.S.C., Horne Coupar; Shelagh Rinald CA, CFP, TEP, Rinald Tax Advisory Inc.

“Education must provide the opportunities for self-fulfillment. It can at best provide a rich and challenging environment for the individual to explore, in his own way.” Noam Chomsky

CONFERENCE SOCIAL EVENTS

EXHIBIT AREA – THE HUB OF THE CONFERENCE!

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

WEDNESDAY SOCIAL EVENTS

3:15 – 5:00 Welcome Reception in the Exhibit Area

Enjoy a warm welcome to Victoria and the 19th Annual National CAGP-ACPDTM conference. Meet and mingle with our exhibitors and sponsors while enjoying a festive atmosphere.

6:30 The Bard and Banker Dinner and Entertainment



1022 Government Street

Sponsored by: CAGP-ACPDTM Vancouver Island RoundTable
Price: \$45 (plus HST) complimentary drink & meal included
Deadline to purchase tickets is April 2, 2012

Join the gang for a special event where you can mingle, make new friends and renew old friendships at The Bard and Banker,* Victoria's upscale pub (walking distance from the Fairmont Empress). Housed in a bank built in 1862, with opulent British décor, featuring its own wine vault (custom built in Italy) and 30 beers on tap. Evening includes mouth-watering local fare, an alcoholic beverage and live music.

**named after Robert Service, who worked at this bank!*

THURSDAY SOCIAL EVENTS

12:30 CAGP-ACPDTM Annual General Meeting and Toolbox Lunch

This is your opportunity to hear from the CAGP-ACPDTM Board and the Executive Director about new developments with the Association. Follow this up with an informal box lunch while you share ideas, perspectives, news and views with like-minded colleagues on a variety of planned giving topics. Be sure to sign up for your preferred topic when you register for your workshop sessions. Tables will fill up quickly!

6:00 CAGP-ACPDTM Reception and Banquet

Join us in the exhibit area for a fun and varied reception, followed by dinner and high-energy entertainment with The Midnights. Known for their energizing performances, they deliver music in the style of the great Pop, Motown and R & B artists. Covering decades of music from the '40s to the present, The Midnights will offer us a fun cabaret-style evening.

Reception sponsored by:

T • E • W E A L T H
E SUCCESSFUL WEALTH STRATEGIES SINCE 1972

Banquet sponsored by:

VICTORIA FOUNDATION
CONNECTING PEOPLE
WHO CARE WITH CAUSES
THAT MATTER®

FRIDAY SOCIAL EVENTS

6:45 Maria Stuarda by Gaetano Donizetti



The Royal Theatre
805 Broughton St.

Performed in Italian with English surtitles
Reception and performance

Sponsored by: Pacific Opera Victoria
Price: \$67 (plus HST)

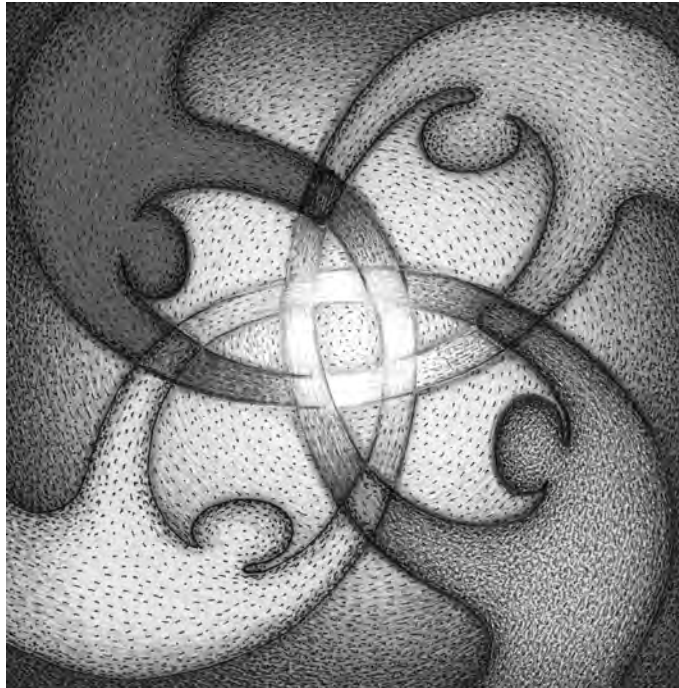
Deadline to purchase tickets is April 2, 2012

Maria Stuarda is operatic fireworks, conjuring up the glory days of Joan Sutherland, Maria Callas and Marilyn Horne. Internationally celebrated Canadian Divas Tracy Dahl and Sally Dibblee come together for the first time on POV's stage to take on the fiery queens in a beautiful new production!

Mix and mingle with conference attendees over passed finger foods and wine at the pre-opera reception. There will be a short pre-show talk about the production for guests.

"Man cannot discover new oceans unless he has the courage to lose sight of the shore." André Gide

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Together.

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Une entreprise
généreuse



SET YOUR SAILS

Explore. Dream. Discover.

CAGP-ACPDPTM Conference
April 18-20, 2012 | Victoria, BC

CONFERENCE REGISTRATION FORM

To register on-line go to: www.cagp-acpdp.org

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

CAGP-ACPDPTM Conference
325 Dalhousie Street, Suite 201
Ottawa, ON K1N 7G2
Tel: (613) 232-7991 or (888) 430-9494
Fax: (613) 232-7286

Website: www.cagp-acpdp.org
E-mail: conference@cagp-acpdp.org

DELEGATE INFORMATION

First Name: _____ Last Name: _____ Designation(s): _____

Job Title: _____

Organization: _____

Address: _____

City: _____ Prov/State: _____ Postal Code/Zip 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-ACPDPTM Conference

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

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

Please complete the other side – Conference Registration Fees

PREMIER CONFERENCE SPONSOR:



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SET YOUR SAILS

Explore. Dream. Discover.

CAGP-ACPDTM Conference

April 18-20, 2012 | Victoria, BC

CONFERENCE REGISTRATION FEES

Early Bird
(Until Feb 24, 2012)

Regular
(After Feb 24, 2012)

FULL CONFERENCE FEES

Member or Gold Associate*:	\$710	\$820	\$ _____
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Non-member:	\$999	\$1112	\$ _____
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* In order to benefit from the "member rate", you need to be a member in good standing while attending the conference

ONE DAY FEES

Wednesday	\$325	\$425	\$ _____
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Thursday*	\$325	\$425	\$ _____
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* Thursday banquet ticket not included

HALF-DAY FOR PROFESSIONAL ADVISORS

(Fee applies only if attending this session and not the full conference)

Friday 7:00 – 1:00	\$250	\$250	\$ _____
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GIFT PLANNING-ALL IN A DAY

PRECONFERENCE - APRIL 17 8:00 – 5:00

Member or Gold Associate:	\$215	\$215	\$ _____
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Non-member:	\$270	\$270	\$ _____
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OPTIONAL SOCIAL ACTIVITIES – BOOKING DEADLINE APR 2

(Not included in the conference fees)

Vancouver Island RT Social Event:	_____ tkts x \$45	\$ _____
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Pacific Opera Victoria:	_____ tkts x \$67	\$ _____
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Extra Thursday banquet ticket*:	_____ tkts x \$103	\$ _____
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(* One Thursday banquet ticket is included in the full conference registration fee)

Subtotal Conference Fees	\$ _____
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12% HST - Registration number: 870678299RT0001	\$ _____
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Processing Fee	\$ 5.00
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Total Conference Fees	\$ _____
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PAYMENT OPTIONS

☐ VISA ☐ MasterCard® ☐ Cheque (payable to CAGP Victoria 2012)

Credit Card number: _____ Expiry date: _____

Name on card: _____

I authorize payment for total conference fees by credit card:

Cardholder Signature _____

Cancellation and Refund Policy

Cancellations are subject to a \$200 administration fee. No refunds for cancellations received after March 16, 2012. No shows forfeit the full registration fee. Substitutions are accepted from the same organization. The cancellation fee can be used as a credit towards the next year's conference for the registered person or their organization.

Please complete the other side – Conference Registration Form



SET YOUR SAILS

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WORKSHOP SESSION SIGN-UP FORM

First Name: _____ Last Name: _____

Telephone: _____ E-mail: _____

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

simultaneous translation

WEDNESDAY APRIL 18, 2012 9:15 - 10:45 a.m.

- _____ Gift Planning Technical Overview (Introductory) W1.1
- _____ Managing the Relationship Web (Estate Administration) (Intermediate) W1.2
- _____ Social Enterprises: Part One-Overview (Advanced) W1.3
- _____ Building Your Case Through the Donor's Eyes (General) W1.4
- _____ Explore Your Personal Narrative (General) W1.5

WEDNESDAY APRIL 18, 2012 11:15 a.m. - 12:15 p.m.

- _____ Tips & Templates-Working Your Legacy Program (Introductory) W2.1
- _____ Life Insurance (Intermediate) W2.2
- _____ Foundations and Endowments as Tools (Intermediate) W2.3
- _____ Social Enterprises: Part Two-Panel Discussion (Advanced) W2.4
- _____ Superlative Donor Care (General) W2.5

WEDNESDAY APRIL 18, 2012 2:15 - 3:15 p.m.

- _____ Demystifying the Gift Planning Conversation (Introductory) W3.1
- _____ Building Endowment Gifts (Intermediate) W3.2
- _____ How to Train Your Dragon: Managing Data (Intermediate) W3.3
- _____ Exploring the Canadian/U.S. Tax Implications of Gifting (Advanced) W3.4
- _____ High Net Worth Clients: One Size Does Not Fit All (General) W3.5

THURSDAY APRIL 19, 2012 9:15 - 10:45 a.m.

- _____ The Straight Goods on Receipting Bequests (Intermediate) W4.1
- _____ Essential Charity Law Update (Intermediate) W4.2
- _____ Numbers That Count: Performance Metrics & Analytics (Intermediate) W4.3
- _____ Ethical Considerations in Gift Planning (Intermediate) W4.4
- _____ Seeing the Person Behind the Resume (Advanced) W4.5
- _____ Planning & Giving for the High Net Worth Individual (Advanced) W4.6

THURSDAY APRIL 19, 2012 11:15 a.m. - 12:15 p.m.

- _____ Testamentary Gift Planning (Intermediate) W5.1
- _____ Business Succession & Legacy Planning (Advanced) W5.2
- _____ 20 Great Places for Narrative in Your Program (General) W5.3
- _____ Designer Endowments (General) W5.4
- _____ Whose Role is it Anyway? The Effective Gift Planning Team (General) W5.5
- _____ Marketing Drives Growth for Your Organization (General) W5.6
- _____ Sponsor Demonstration-Gryphon Consulting (General) W5.7

THURSDAY APRIL 19, 2012 2:00 - 3:00 p.m.

- _____ The Anatomy of a Lawsuit (Introductory) W6.1
- _____ Human Dimensions- Talking About Death & Dying (Intermediate) W6.2
- _____ Is the Internet Losing You Gifts (Intermediate) W6.3
- _____ Donor Rights and Remedies (Intermediate) W6.4
- _____ Donations of Land (Intermediate) W6.5
- _____ I Wanted to Give Back (General) W6.6
- _____ Sponsor Demonstration - T.E. Wealth (General) W6.7

THURSDAY APRIL 19, 2012 3:45 - 4:45 p.m.

- _____ Out of the Cold - Turn Your Lists to Visits (Introductory) W7.1
- _____ Building Productive Relationships (Intermediate) W7.2
- _____ When to Issue Charitable Receipts (Advanced) W7.3
- _____ Top Ten Things Donors Are Asking (General) W7.4
- _____ Grooming Yourself as the Non-Profit Leader of Tomorrow (General) W7.5
- _____ CAGP-ACPDTM Government Relations (General) W7.6

FRIDAY APRIL 20, 2012 9:15 - 10:45 a.m.

- _____ Gifts from the Neglected Mid-income Canadian (Intermediate) W8.1
- _____ Tracking Planned Giving Activity & Results (Intermediate) W8.2
- _____ Introduction to Gifts From Private Companies (Intermediate) W8.3
- _____ Recent Legislative and Policy Changes (General) W8.4
- _____ Beyond Bequests: Tools and Tips (General) W8.5

Please complete the reverse side of this form – Toolbox Topic Session Sign-up Form

Please return this form to the CAGP-ACPDTM National office:

**325 Dalhousie Street, Suite 201
Ottawa, ON K1N 7G2
Fax: 613-232-7286
E-mail : conference@cagp-acpdp.org**



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TOOLBOX TOPIC SIGN-UP FORM

First Name: _____ Last Name: _____

Organization: _____

Telephone: _____ E-mail: _____

Please choose only one Toolbox topic but indicate a second choice in case the table is full. Please note: Topic discussions are limited to tables of eight.

THURSDAY APRIL 19, 2012

12:30 - 2:00 p.m

- _____ Faith-based Gift Planning
- _____ Gift Planning in the Small Charity
- _____ Gift Planning in the Health Field
- _____ Gift Planning in the Education Sector
- _____ Gift Planning in the Cultural Sector
- _____ Tracking & Benchmarking Your Planned Giving Activities
- _____ The Donor Visit
- _____ Marketing to Various Demographics
- _____ Integrating a Planned Giving Goal into an Overall Campaign
- _____ Starting the Conversation- Talking to Donors/Prospects about Planned Giving
- _____ Managing Your Endowments Today
- _____ Annuities
- _____ CAGP-ACPDPTM Government Relations
- _____ Working with Professional Advisors
- _____ Ethics in Gift Planning
- _____ Working with a Volunteer Planned Giving Committee
- _____ Social Enterprise
- _____ CFRE Accreditation
- _____ What to do in the Market in Difficult Times
- _____ Stewarding Donors Who Give Through Donor Advised Funds
- _____ Working with an Aging Population

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Ottawa, ON K1N 7G2

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