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™
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
Conference Sponsors

We wish to recognize and thank all of our sponsors:

**Premier Conference and Delegate Bag Sponsor**

RBC Wealth Management

**Leave A Legacy™ Chairs Forum Sponsor and National Leave A Legacy™ Development Sponsor**

Great-West Life
London Life
Canada Life

**Stronger Communities Together™**

**Corporate Educational Sponsor**

Mackenzie Investments

**Plenary Sponsors**

Carters
Fasken Martineau

**Portfolio Sponsor**

Vancity Community Foundation

**Banquet Sponsor**

Victoria Foundation

**Lanyard Sponsor**

Bull, Housser & Tupper LLP

**Reception Sponsors**

Lawton Partners Financial Planning Services Ltd
McConnan Bion O’Connor & Peterson
T.E. Wealth

**Refreshment Break Sponsors**

Blakely & Associates Inc.
Grant Thornton LLP

**Social Event Sponsors**

CAGP-ACPDP™ Vancouver Island RoundTable
Pacific Opera Victoria

**Gift Sponsor**

Silk Road

**Educational Workshop Sponsors**

G2 Give Green Canada (Patrimoine vert)
Grant Thornton LLP
Gryphon Consulting
Investors Group
Phillips, Hager & North Investment Management Ltd.
Sweatman Law Firm

**Exhibitors**

Blakely & Associates Inc.
BMR Group
Canada Revenue Agency
Carters Professional Corporation and Fasken Martineau DuMoulin LLP
Investors Group
LEAVE A LEGACY™
Miller Thomson LLP
PGgrowth
ProDon-Logilya
RBC Wealth Management
Scotia Private Client Group
TD Waterhouse
T.E. Wealth

The organizations listed were confirmed at time of printing.
**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.

---

### Conference Schedule

**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-ACPDP™ 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-ACPDP™ 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](http://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

<table>
<thead>
<tr>
<th></th>
<th>Early Bird (Until Feb 24, 2012)</th>
<th>Regular (After Feb 24, 2012)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member or Gold Associate*</td>
<td>$710</td>
<td>$820</td>
</tr>
<tr>
<td>Non-member</td>
<td>$999</td>
<td>$1112</td>
</tr>
</tbody>
</table>
| * In order to benefit from the “member rate”, you need to be a member in good standing while attending the conference

**One Day Fees**

<table>
<thead>
<tr>
<th></th>
<th>Wednesday</th>
<th>Thursday*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member or Gold Associate*</td>
<td>$325</td>
<td>$325</td>
</tr>
<tr>
<td>Non-member</td>
<td>$325</td>
<td>$425</td>
</tr>
</tbody>
</table>
| * 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

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Member or Gold Associate*</td>
<td>$250</td>
</tr>
<tr>
<td>Non-member</td>
<td>$250</td>
</tr>
</tbody>
</table>

**Gift Planning-All in a Day**

Preconference - April 17 8:00 – 5:00

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Member or Gold Associate*</td>
<td>$215</td>
</tr>
<tr>
<td>Non-member</td>
<td>$215</td>
</tr>
</tbody>
</table>

**Optional Social Activities booking deadline April 2**
(Not included in the conference fees)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>The Bard and Banker</td>
<td>$45</td>
</tr>
<tr>
<td>Pacific Opera Victoria</td>
<td>$67</td>
</tr>
<tr>
<td>Extra Thursday banquet ticket*</td>
<td>$103</td>
</tr>
</tbody>
</table>
| (* 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](http://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
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-ACPDP™ 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-ACPDP™ 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 Advics, CGA and CFRE. Contact the CAGP-ACPDP™ 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-ACPDP™ 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-ACPDP™ 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-ACPDP™ 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-ACPDP™ conference Office at 1-866-296-5882.

Questions?
CAGP-ACPDP™ 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
**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:

![TD](https://example.com)

---

**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: 

![Scotia Private Client Group](https://example.com) - Anticipate

---

**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:

![CARTERS](https://example.com) - FASKEN MARTINEAU - www.fasken.com

---

**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:

[Miller Thomson LLP](https://example.com)

---

**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.
### Tuesday Pre-Conference Sessions

**8:00 – 5:00**

**Gift Planning – All in a Day**

**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:**

![Sponsors]

### Wednesday Workshop Sessions

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

**9:15 – 10:45**

**Gift Planning Technical Overview**

Brad Offman, Mackenzie Financial

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

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**

David Lepage, Enterprising Non-Profits; Elizabeth Lougheed 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**

Helen DeBoer-Daggett, The Hilborn Group

**Explore your Personal Narrative & Discover the Art of Authentic Conversations**

Norma Cameron CFRE, The Narrative Company

**Sponsored by:** Gryphon Consulting

**11:15 – 12:15**

**Tips & Templates – Working your Legacy Program**

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

**Life Insurance**

Alain Lévesque, DeVimy Group

**Foundations and Endowments as Gift Planning Tools**

Ron Kelly, PlanGiv Capital Ltd.

**Social Enterprises: Part 2 Panel Discussion**

David Lepage, Enterprising Non-Profits; Elizabeth Lougheed 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**

Gwen Chapman, Independent Fundraising Consultant
2:15 – 3:15

Demystifying the Gift Planning Conversation
Linda Pearson MBA, MA, Queen’s University

From Here to Forever- Building Endowment Gifts
Karen Good, Edmonton Community Foundation

How to Train Your Dragon: Mastering Data
Beth Proven CFRE, CIM, University of Manitoba

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

Sponsored by: Grant Thornton LLP

High Net Worth Clients: One Size Does Not Fit All!
Jo-Anne Ryan PFP, TD Waterhouse

“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 Fulbright

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

Essential Charity Law Update
Terrance S. Carter LL.B., Carters Professional Corporation

Numbers That Count: Performance Metrics and Analytics
Malcolm Berry MBA, SickKids Foundation; Doug Puffer, Simon Fraser University; Simon Trevelyan, S.T. Legacy Group

Ethical Considerations in Gift Planning
Ian M. Fraser MBA, FAHP, PlanGiv

Sponsored by: Sweatman Law Firm

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

Planning and Giving for the High Net Worth Individual and their Families: An Inspired Approach
Mike Skrypnek AIFP, Richardson GMP Limited

= Translated
11:15 – 12:15

**Testamentary Gift Planning: Considerations, Options and Strategies**  
Laura West J.D., Fasken Martineau DuMoulin LLP  
**Business Succession Planning & Legacy Planning**  
Brenda McEachern LL.B., TEP, Canada Life  
**20 Great Places for Narrative in Your Planned Giving Program**  
Leah Eustace, Good Works  
**Designer Endowments**  
Christine Basque, Canadian Breast Cancer Foundation, BC/Yukon Region; Leslie Howard PFP, Planforgifts.com  
**Whose Role is it Anyways? The Effective Gift Planning Team**  
Dree Thomson-Diamond ACFRE, DTD Consulting  
**Marketing Drives Growth for Your Organization**  
J. Andrew Flynn EMBA, T.E. Wealth  
**Sponsor Demonstration – Gift Planning Templates & Tools**  
Tara Gish, Gryphon Consulting

2:00 – 3:00

**The Anatomy of a Lawsuit**  
Mark S. Weintraub LL.B., Clark Wilson LLP  
**Human Dimensions – Talking about Death and Dying**  
Speaker to be confirmed  
**Is the Internet Losing You Gifts?**  
Paul Nazareth, Scotia Private Client Group  
**Donor Rights and Remedies**  
Theresa L.M. Man LL.B., Carters Professional Corporation  
**Donations of Land to Registered Charities in Canada**  
Sandra Enticknap LL.B., Miller Thomson LLP; Grant Monck LL.B., Ducks Unlimited Canada  
**I Wanted to Give Back**  
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**  
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

<table>
<thead>
<tr>
<th>Title</th>
<th>Speaker(s)</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out of the Cold – Turn Your Lists to Visits</td>
<td>Carla Funk, First Peoples’ Heritage, Language and Culture Council; Marnie Hill CFRE, Canadian Red Cross</td>
<td>Intro</td>
</tr>
<tr>
<td>Building Productive Relationships between Professional Advisors and Charities</td>
<td>Colleen DeJager TEP, London Health Sciences Foundation; Ryan Fraser CFP, CIM, Freedom 55 Financial; Sue Hardy CFRE, St. Joseph’s Health Care Foundation</td>
<td>Inte</td>
</tr>
<tr>
<td>When to Issue Charitable Receipts and Other Mysteries</td>
<td>M. Elena Hoffstein LL.B., Fasken Martineau DuMoulin LLP</td>
<td>Adv</td>
</tr>
<tr>
<td>Tools You Require to Set Sail - Top Ten Things Donors are Asking</td>
<td>Michelle M.B. Osborne CFRE, University of Toronto</td>
<td>Gen</td>
</tr>
<tr>
<td>Grooming Yourself as the Non-profit Leader of Tomorrow</td>
<td>Deborah Legrove CFRE, crawfordconnect</td>
<td>Gen</td>
</tr>
<tr>
<td>CAGP-ACPDP™ Government Relations Update</td>
<td>Neil Cochrane, Charities Directorate, Canada Revenue Agency; Members of the CAGP-ACPDP™ Government Relations Committee</td>
<td>Gen</td>
</tr>
</tbody>
</table>

### Friday Workshop Sessions

#### 9:15 – 10:45

<table>
<thead>
<tr>
<th>Title</th>
<th>Speaker(s)</th>
<th>Level</th>
</tr>
</thead>
</table>
| Opportunities Abound - Gifts from the Neglected Mid-income Canadian | Dee Govang CFP, Investors Group Financial Services Inc.  
Sponsored by: Investors Group                                                                                                                                         | Inte  |
| Tracking Planned Giving Activity and Results                         | Paola Coronado, BBA; Alyson M. Murzsa MSc. and Isabela Zabava LL.B., BC Cancer Foundation                                                                                                               | Inte  |
| Introduction to Gifts from Private Companies – A Gift Worthy of Your Consideration | DeWayne Osborn M.P.Ed, CFP, CGA, Lawton Partners Financial Planning Services Ltd.                                                                                                                               | Inte  |
| Recent Legislative and Policy Changes: The Implications for Charitable and Not-for-Profit Boards | Sophia Dunkley LL.B., Sweatman Law Firm  
Sponsored by: Phillips, Hager & North Investment Management Ltd.                                                                                                         | Gen   |

“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-ACPDP™ 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-ACPDP™ 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-ACPDP™ Annual General Meeting and Toolbox Lunch
This is your opportunity to hear from the CAGP-ACPDP™ 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-ACPDP™ 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:

Banquet sponsored by:

Friday Social Events

6:45 Maria Stuarda by Gaetano Donizetti
1022 Government Street
Sponsored by: CAGP-ACPDP™ Vancouver Island RoundTable
Price: $45 (plus HST) complimentary drink & meal included
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
Our community. Our future.

Together.

Proud to be the National Development Sponsor of LEAVE A LEGACY™

STRONGER COMMUNITIES TOGETHER™
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-ACPDP™ 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-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.

Please complete the other side – Conference Registration Fees

PREMIER CONFERENCE SPONSOR:

RBC Wealth Management
Conference Registration Fees

**Full Conference Fees**

<table>
<thead>
<tr>
<th></th>
<th>Early Bird (Until Feb 24, 2012)</th>
<th>Regular (After Feb 24, 2012)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member or Gold Associate*</td>
<td>$710</td>
<td>$820</td>
</tr>
<tr>
<td>Non-member</td>
<td>$999</td>
<td>$1112</td>
</tr>
</tbody>
</table>

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

**One Day Fees**

<table>
<thead>
<tr>
<th>Day</th>
<th>Early Bird</th>
<th>Regular</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday</td>
<td>$325</td>
<td>$425</td>
<td>$</td>
</tr>
<tr>
<td>Thursday*</td>
<td>$325</td>
<td>$425</td>
<td>$</td>
</tr>
</tbody>
</table>

* Thursday banquet ticket not included

**Half-day for Professional Advisors**

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

<table>
<thead>
<tr>
<th>Day</th>
<th>Early Bird</th>
<th>Regular</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday</td>
<td>$250</td>
<td>$250</td>
<td>$</td>
</tr>
</tbody>
</table>

**Gift Planning-All in a Day**

Preconference - April 17 8:00 – 5:00

<table>
<thead>
<tr>
<th></th>
<th>Early Bird</th>
<th>Regular</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Member or Gold Associate</td>
<td>$215</td>
<td>$215</td>
<td>$</td>
</tr>
<tr>
<td>Non-member</td>
<td>$270</td>
<td>$270</td>
<td>$</td>
</tr>
</tbody>
</table>

**Optional Social Activities – booking deadline Apr 2**

(Not included in the conference fees)

<table>
<thead>
<tr>
<th>Event</th>
<th>Early Bird</th>
<th>Regular</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Vancouver Island RT Social Event</td>
<td></td>
<td>$45</td>
<td>$</td>
</tr>
<tr>
<td>Pacific Opera Victoria</td>
<td></td>
<td>$67</td>
<td>$</td>
</tr>
<tr>
<td>Extra Thursday banquet ticket*</td>
<td></td>
<td>$103</td>
<td>$</td>
</tr>
</tbody>
</table>

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

**Subtotal Conference Fees**

<table>
<thead>
<tr>
<th></th>
<th>Early Bird</th>
<th>Regular</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**12% HST - Registration number: 870678299RT0001**

<table>
<thead>
<tr>
<th></th>
<th>Early Bird</th>
<th>Regular</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing Fee</td>
<td></td>
<td></td>
<td>$5.00</td>
</tr>
<tr>
<td>Total Conference Fees</td>
<td></td>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

**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
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) 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 Giving (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 Anyways? 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-ACPDP™ 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 return this form to the CAGP-ACPDP™ National office:

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

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

Please return this form to the CAGP-ACPDP™ National office:

325 Dalhousie Street, Suite 201
Ottawa, ON K1N 7G2
Fax: 613-232-7286
E-mail: conference@cagp-acpdp.org
Bringing together good people with good causes

RBC is proud to support inspired, responsible giving that makes a meaningful difference to our communities – both as a donor and by helping our clients maximize their gifts.

www.rbcwealthmanagement.com

©Registered trademarks of Royal Bank of Canada. Used under licence. © 2011 Royal Bank of Canada. All rights reserved.