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

Creating Capital Connections

CAGP-ACPDP™ Conference • April 17-19, 2013 • National Capital Region

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Creating Capital Connections

CAGP-ACPDP™ Conference • April 17-19, 2013 • National Capital Region

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.

Why Attend?

- Update your gift planning resources and tools
- Learn and share ideas that help Canadians achieve their philanthropic dreams
- Stay on the cutting edge with best practices and emerging issues
- Renew your sense of passion and enthusiasm for planning gifts
- Broaden your professional network and foster lasting friendships

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

CONFERENCE SCHEDULE AT-A-GLANCE

TUESDAY

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

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 in Exhibit Hall
11:15 – 12:15	Workshop sessions
12:30 – 2:00	Lunch and Plenary Session
2:15 – 3:15	Workshop sessions
3:15 – 5:00	Welcome Reception in the Exhibit Hall
6:30	Dine Around

THURSDAY

7:00	Registration opens / Breakfast
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 Plenary session
2:00 – 3:00	Workshop sessions
3:00 – 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 National Arts Centre

Photo credits: Ottawa Tourism

Registration Information

To register, complete the registration and session sign-up forms or visit our secure registration site at: www.regonline.com/CAGP2013

CONFERENCE REGISTRATION FEES

Note: HST is not included in fees

Full Conference Fees

	Early Bird (Until Feb 25, 2013)	Regular (After Feb 25, 2013)
Member or Gold Associate*:	$750	$850
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.

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)

One Day Fees:

Wednesday	$325	$425
Thursday	$325	$425
Extra Thursday banquet ticket*:		$106

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

Special Conference Workshops for Professional Advisors

Half-Day Professional Advisors Session

Friday 7:00 – 1:00 $250

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.

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

Gift Planning – All in a Day

PRE-CONFERENCE - APRIL 16 8:00 – 5:15

Member or Gold Associate:	$290	$290
Non-member:	$325	$325

Optional Social Activity

BOOKING DEADLINE MAR 22

APRIL 19, 7:00

Alberta Ballet- Love Lies Bleeding: $57.17

Payment

Please make your cheque payable to CAGP Gatineau 2013. Payment may also be made by Visa or Mastercard®. HST is not included in fees.

Cancellation and Refund Policy

Notice of all cancellations must be received in writing. Before March 15 2013, 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 2014 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 16 2013 - without exception. No-shows forfeit the full registration fee.

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 4, 2013.

Education Credits

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

Register Online at:

www.regonline.com/CAGP2013

General Information

Accommodations

The Hilton Lac-Leamy
3, Boulevard du Casino
Gatineau, QC J8Y 6W3

Reservations: 819-790-6444

Room Rates: Single or double room: $165.00 (plus applicable taxes and fees) per night. Mention the CAGP-ACPDP™ Conference to receive this preferred rate.

Deadline to book: After March 15, 2013 the conference room rate and hotel rooms are not guaranteed.

Click here for hotel reservations

Travel Information and Discounts

By Car

The Hilton Lac-Leamy website provides driving directions to the hotel.

By Air

Ottawa's Airport, the Macdonald-Cartier International Airport, is a 30-minute drive from the Hilton Lac-Leamy in Gatineau. The Airport has daily direct and non-stop flights from Canada and the United States. The airport website is: http://www.ottawa-airport.ca/

WestJet Travel Discount for CAGP-ACPDP™ Delegates

10% discount off the airline's best available fare at the time of booking (excluding seat sales and web fares). Please call the WestJet Groups Department to make your reservation.

Availability: Discounted rates are available up to 3 days prior and 3 days after the conference dates.

Booking code: CC5426 **Reservations:** 1-888-493-7853

Taxi Service from Airport

Rates: approximately $50.00 CDN one-way between the airport and hotel.

By Train

10% off the best available Via Rail fare in Economy, Business, Sleeper, or Sleeper Touring class. Fare applies to a maximum of two passengers per booking. Subject to the conditions and restrictions of the fare plan to which the additional discount is being applied.

Exception: Discount does not apply in Economy - special fare or Business - supersaver fare

Availability: April 15 to April 22, 2013

Booking code: 12424

Reservations: 1-888-842-7245 or www.viarail.ca

Online booking tips: You have to log in to your profile, or create one prior to booking. On the Passenger information screen, select "Convention fare" from the "Discount Type" drop-down menu, and enter the conference discount code in the "Discount code" field. The conference fare will be shown on the next page.

Tourism in the National Capital Region

There are several websites for the National Capital Region that can provide you with information to make the most of your stay.

Tourism Outaouais Ottawa Tourism National Capital Region

Dress Code

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

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.

Questions?

Tel: 1-888-430-9494 / 613-232-7991

Email: conference@cagp-acpdp.org

Website: www.cagp-acpdp.org

Register online at: www.regonline.com/CAGP2013

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PLEASE NOTE: SPEAKERS AND PROGRAM ARE SUBJECT TO CHANGE.

Plenary Sessions

Opening Plenary

WEDNESDAY APRIL 17 8:00

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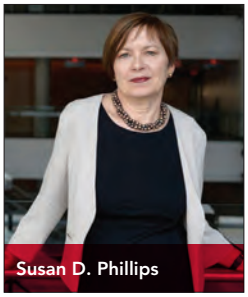
The Future for Philanthropy and Canada's Non-profit Sector

WEDNESDAY APRIL 17 12:30


Susan D. Phillips

The professional practice and expectations of philanthropy are changing rapidly. A greater focus on impact, innovative approaches to social finance; philanthropists who take more of a hands-on approach; and the transparency created by open source data are placing new demands on and creating new opportunities for non-profits, charities and social enterprises. This session explores the medium term future for philanthropy and civil society in Canada. What are the key opportunities and hurdles that this sector will face over the next ten years? How do its leaders and policy makers take advantage of new opportunities to enable philanthropy and the non-profit sector to fully realize their potential? What kinds of new knowledge, skills organizational strategies and public policy will be needed?

Susan D. Phillips is Professor and Director, School of Public Policy and Administration, Carleton University and Research Associate, Carleton Centre for Community Innovation (3ci).

SPONSORED BY: TD

Great Traits of Champions – The Leader Traits

THURSDAY APRIL 18 8:00


Mark Tewksbury

Mark Tewksbury knows the great traits it takes to be a champion. He burst onto the scene at the Barcelona Olympics with a gold medal victory in the 100-metre backstroke, and would eventually retire a triple medal winner, and become a respected humanitarian champion, sharing the stage with the Dalai Lama and featured at the United Nations conference. In this practical, engaging presentation, Mark outlines the fundamentals for creating champion organizations and teams.

Mark's athletic career highlights include 21 national titles, seven world records, and a cover appearance on TIME Magazine. Mark has been inducted into the Canadian Olympic Hall of Fame and the Canadian Sports Hall.

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What's New at the Charities Directorate?

THURSDAY APRIL 18 12:30


Cathy Hawara

Cathy Hawara, Director General, Charities Directorate, will speak about the recent changes to the Income Tax Act and the new reporting requirements that have resulted. Budget 2011 changed the rules that apply to qualified donees and introduced new rules regarding "ineligible individuals". Budget 2012 introduced new measures related to the political activities of charities, including increased transparency and enhanced education and compliance activities.

As Director General, Charities Directorate with the Canada Revenue Agency, Cathy Hawara is responsible for the overall management of the federal regulation of registered charities under the Income Tax Act.

SPONSORED BY: Miller Thomson lawyers | avocats

The Donor Crystal Ball

FRIDAY APRIL 19 8:00


Jennifer Conley

What turns donors on or off? What do they really think about our pitches? What motivates a donor to give, or not to give? How can we earn, keep or lose their trust? Hear firsthand from a panel of candid, articulate, informed donors who want to help us attract and retain philanthropic support.

Jennifer Conley's career has been solely focused in the philanthropic sector in progressively responsible leadership roles in Education, International Development and Health Care. She is currently Director of Faculty Development and Major Gifts at Carleton University.

SPONSORED BY: Phillips, Hager & North Investment Management™

Complete speaker biographies can be found online at: www.cagp-acpdp.org

Workshop Sessions

TUESDAY

Pre-conference Sessions

8:00 – 5:15

Gift Planning — All in a Day

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

8:00 – 5:00

RoundTable / LEAVE A LEGACY™ Leaders Forum

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

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WEDNESDAY

Workshop Sessions

9:15 – 10:45

Les dons planifiés pour petites organisations

DÉBUTANT

Vous êtes associés à une petite organisation charitable, vous souhaitez exploiter le potentiel que représente les dons planifiez et vous doutez qu'un programme de dons planifiés peut être possible dans une petite organisation? Venez évaluer votre situation et découvrir comment vous pouvez y arriver.

François Mercier, Apprendre à recevoir

Gift Planning Technical Overview

INTRODUCTORY

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

Jill Nelson CFRE, The Princess Margaret Cancer Foundation

Let's Face It! Making Connections Through Effective Donor Visits

INTERMEDIATE

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 your donor visits a powerful tool in your relationship management strategy.

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

Gifts by Will (or De-Mystifying the Confusion)

INTERMEDIATE

This session will provide participants with a general overview of taxation on death and the tax benefits of testamentary charitable giving. It will provide an overview of various testamentary gift planning options and provide examples of specific tax-efficient testamentary charitable giving strategies with a focus on clarifying the rules related to testamentary charitable gifts that qualify as gifts by will, gifts by a trust or gifts to charities as beneficiaries.

M. Elena Hoffstein, Fasken Martineau DuMoulin LLP

New and Interesting Case Studies

ADVANCED

Join Susan as she walks through a number of recent case studies that will have you thinking about the conversations you have had or could have had. Attendees will have the opportunity to delve further into these various scenarios, discuss the options, learn new rulings and understand some more advanced concepts.

Susan Manwaring LL.B., Miller Thomson LLP

Your Donors Have Spoken

GENERAL

Over the past 15 years, Good Works has conducted dozens of focus groups made up of donors to charitable organizations across Canada. We've talked to these donors about planned giving messaging, and approaches. We've probed them about which approaches work, and which approaches turn them off. What donors have told us in these focus groups will surprise you and will help you fine tune your own planned giving program.

Leah Eustace CFRE, Good Works

Workshop Sessions Continued...

11:15 – 12:15

Les dons planifiés, démystifiés

DÉBUTANT

De plus en plus d'oeuvres de bienfaisance adoptent un programme de dons planifiés. Par le biais d'exemples simples et concrets, découvrez les avantages de ce type de dons et les stratégies qui permettront à vos donateurs de faire des dons planifiés sans nécessairement s'appauvrir ou déshériter leurs successions.

Claude Desjardins, Financière Banque Nationale

Upsizing Bequests by Using Insurance

INTERMEDIATE

Gifts of insurance can help your donors be more generous than they ever imagined, while creating a significant income stream for your charity. Canada's experts in donor communications and giving through innovative insurance products will talk about educating your donors about win-win insurance-based giving options. We'll also help you upsize existing bequest pledges by using insurance, and avoid pitfalls like lapsed policies by making the best use of unique insurance products ideal for charitable giving.

Jack Bergmans CFP, Marlena McCarthy and Judy Dore, Bequest Insurance

High Net Worth Donors Sliced and Diced by Profession

INTERMEDIATE

High net worth clients do not all look the same! Jo-Anne will discuss the characteristics of different types of high net worth clients, how they typically hold their assets and the most appropriate gift planning strategy for each type. Learn how to customize your approach for business owners, executives, doctors, dentists, engineers, retirees, lawyers and more!

Jo-Anne Ryan PFP, TD Waterhouse

Forming Allies and Centres of Influence by Cultivating Professional Relationships

INTERMEDIATE

Enhance your relationships with your allied professionals. Strengthen your networks. Become an invaluable resource. Adopt a holistic approach to your practice by maintaining relationships with other professionals such as financial planners, lawyers and accountants to increase your knowledge, opportunities and your client satisfaction. Become truly service-oriented to create deep, lasting connections and offer solutions that go beyond your field of practice.

Patrick McGuire, Rogers Group Financial

Planning Without Borders – Part I: Interprovincially

ADVANCED

Gift planners cannot take provincial borders for granted. Different provinces have different regimes which could result in penalties rather than funds! Gift planners also need to have a basic understanding of the tax rates in the various provinces to better solicit gifts. This presentation will survey all the important parts of raising funds interprovincially

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

The Elder and Vulnerable Donor

GENERAL

Elderly donors are already an important segment of the gift planning community. As the population continues to age, elderly donors will become even more important. This presentation will also focus on the legal and ethical issues that can arise when gift planners deal with elderly (and potentially vulnerable) donors. It will address ways that charities can proactively protect gifts made by this segment of the population and deal with any disputes that may arise.

Laura E. West J.D., Fasken Martineau DuMoulin LLP

2:15 – 3:15

Le droit de rêver

INTERMÉDIAIRE

Lorsque la Fondation du CHUQ s'est lancée dans un programme de donateur individuel majeur, elle s'est donné le droit de rêver. En misant sur la conviction et l'expérience donateur, elle met en œuvre des pratiques gagnantes pour faire évoluer le donateur vers le don majeur et planifié dans le but de faire de lui un véritable bâtisseur de projet philanthropique. La conférence invite à réfléchir sur les meilleures approches en matière de sollicitation du don majeur individuel.

Guylaine Martin, Fondation du CHUQ (Centre hospitalier universitaire de Québec)

Gift Acceptance Policies

INTRODUCTORY

'We'll take it!' If it hasn't already happened, it's only a matter of time before your charity is offered an unexpected gift. Where will you turn? A gift acceptance policy is a compilation of guidelines and suggestions that is customized to your charity's circumstances and needs. This session will review why you should have a gift acceptance policy and things to consider as you head down the path of creating or reviewing a gift acceptance policy that fits the needs of your charity.

Michelle M.B. Osborne CFRE, University of Toronto

Estate Administration for Charities

INTERMEDIATE

This session will help charities understand what to expect after they are notified of an interest in an estate and their rights as a beneficiary. Through case studies, the steps involved in administering an estate will be reviewed so that participants have a better idea of what to expect and understand why estates do take some time to be completed.

Susan McIntosh, The Ottawa Hospital Foundation; Lorraine O'Keefe, Scotia Private Client Group

Cultivating the New Cadre of Leaders: Canada's First Masters in Philanthropy

INTERMEDIATE

You have aspirations to be a leader in Canadian philanthropy, but do you have the knowledge, skills and credentials? What will be required for the new cadre of leaders? In summer 2013, Carleton University launches Canada's first Masters in Philanthropy and Nonprofit Leadership that will be a game changer for professional practice. Learn about the program and provide your ideas for the curriculum required to meet the emerging challenges in our field.

Susan D. Phillips Ph.D., Carleton University

Values, Voice and Venture in an Emerging Generation

ADVANCED

Mom and Dad have a certain idea of how their amassed wealth should be distributed. Junior has a different view. Come and learn how we can 'all just get along' without becoming the Kardashians. Learn how every generation can have a voice at the 'adult table' and gain a heightened appreciation for each others' values.

Jack Silverstein, National Capital Region YMCA-YWCA

Donor Relations — Maybe it is Rocket Science?

GENERAL

Fundraising is changing – at rocket speed! Long gone are the days when donations magically arrived. Strong donor relations and comprehensive analytics are becoming increasingly more important in both planned giving and overall fundraising strategies. The combination of competition for donor dollars, improved organizational transparency and unstable economic times – makes it crucial that we stay connected with our donors. Learn how to combine the science of fundraising and donor relations – you will see … it is outta this world!

Samantha Laprade, Boys and Girls Club of Ottawa

THURSDAY

Workshop Sessions

9:15 – 10:45

Allez rencontrer les donateurs : Un appel téléphonique, une lettre ou un courriel sont insuffisants

TOUS

Comme moi, plusieurs personnes préféreraient aller chez un arracheur de dents plutôts que de solliciter un donateur potentiel. Spécialement si vous ne le connaissez pas. Cet atelier vous aidera à vous défaire d'une partie de la peur qui vous habite lorsqu'il s'agit de solliciter un donateur. Vous sortirez avec des stratégies et des outils pour augmenter votre confort et votre efficacité.

François Mercier, Apprender à recevoir

Practical Implications of CRA New Governance Rules and Top 10 CRA Compliance Issues

INTERMEDIATE

As a result of the federal budget, new rules are in place on who may be qualified to be directors and officers of a charity or have control and management over a charity, without jeopardizing its charitable status. The first part of this session will review these new rules; explain what charities need to know to ensure compliance with these rules; and review issues for the purpose of developing effective strategies for compliance. The second half of the presentation will review the top 10 CRA compliance issues that gift planners need to be aware of in their work in order not to jeopardize their charitable status.

Karen J. Cooper LL.B. and Theresa L.M. Man LL.B., Carters Professional Corporation

Numbers that Count in Planned Giving 2013

INTERMEDIATE

Starting and building a planned giving program takes a leap of faith for most charities. Which performance metrics will help you manage expectations, measure success? How can basic fundraising analytics keep you on track? Where will you get the biggest bang for your buck? Practical advice and proven management tools from experienced gift planners will help you start, accelerate, manage and lead a program in planned giving.

Denise Fernandes, SickKids Foundation; Doug Puffer, Simon Fraser University; Simon Trevelyan, S.T. Legacy Group

Workshop Sessions Continued...

See it, Feel it, Hear it – The Motivational Power of Donor Presentations

GENERAL

Are you an allied professional who is wondering how to partner with charities? Are you a fundraiser who is experienced with direct marketing and donor visits but haven't tried adding donor presentations to your program? Join us to hear first hand how one professional advisor has successfully partnered with a wide variety of charities to engage donors in a legacy conversation. You will also learn about what is involved on the charity side.

Yolanda Bronstein, SickKids Foundation; Keith N. Thomson CFP, CIM, FCSI, Stonegate Private Counsel; Marcella Zanella, Nature Conservancy of Canada

Social Enterprise and Charities: What, Why, How

GENERAL

Charities across Canada are increasingly using social enterprise as another tool to advance their missions and to enhance their financial sustainability. This workshop explores the social enterprise ecosystem as a complement to traditional fundraising, including the definition, the roles and the myths, and the legal issues and available structures. Learn whether the business models and regulatory regime of social enterprise is appropriate for your organization. We'll view the evolving landscape from several vantage points: practitioner, policy, legal and funder.

Michael Blatchford LL.B., Bull Housser & Tupper LLP; David LePage, Enterprising Non-Profits / enp

The Leadership Connection

GENERAL

Every aspect of gift planning depends on our ability to connect with people, whether donors, staff or colleagues. We admire larger-than-life leaders who seem to effortlessly connect with everyone around them. It turns out that this is not an unattainable gift, but a series of skills and behaviours that we can all practice. Drawing on lessons from great leaders, we will break down the components of truly connecting with people and show how to practise these skills every day.

Susan Doyle, SD Coaching

11:15 – 12:15

Intégration des dons planifiés dans le cadre d'une campagne majeure

INTERMÉDIAIRE

Cet atelier vise à démontrer : comment intégrer les dons planifiés à une campagne majeure; comment mettre en place une approche mixte – dons immédiats et dons différés – auprès d'un donateur, tout en tenant compte des besoins d'une organisation; comment collaborer avec les membres du cabinet de campagne et les responsables des autres types de dons (dons annuels, dons corporatifs…) et; comment reconnaitre et intégrer les dons planifiés au programme de reconnaissance et d'intendance

Jocelyne Gonthier, Fondation HEC Montréal

No More Excuses — The Time to Talk to your Gift Planning Prospects is Now!

INTRODUCTORY

Do you sometimes find yourself procrastinating about getting out of the office and having face to face conversations with your prospects about planned gifts? We all know that it is far easier to stay in the office and work on our filing system than to initiate those important conversations with our prospects. This session will provide you with some ideas and tips to help you get out there and have productive conversations with your planned giving prospects.

Michele Shea and Sheila Steger MA, CFRE, University of Alberta

How to Talk to Your Donors About Investing

INTRODUCTORY

The world has changed, and donors and potential donors have become increasingly sophisticated in their approach to both philanthropic planning and investing, which are now increasingly intertwined. Are you missing opportunities because you are not as comfortable as you would like to be with investment concepts? Learn the basic terms and concepts, to enable you to feel more confident when speaking to your donors, potential donors, and board members. In this workshop, you will learn the basics of investing and the fundamentals of how an endowment is invested

Andrea Robertson and Bernard St. Lewis CFA, CFP, CIM, FCSI, TD Waterhouse Private Investment Counsel

Private Foundations and Endowment Funds

INTERMEDIATE

As an advisor to the wealthy, charitable giving is an important part of your business. You need to offer expert advice, and a simple but effective way to help your clients structure large charitable gifts that realize their philanthropic goals while maintaining the integrity of their investment, estate and tax planning strategies. Learn valuable insights on the private foundations, endowment funds and DAFs from our legal and charity experts who will share their views and stories on relationships with charitable clients and how advisors can help guide them as they plan their legacy.

Carole Chouinard LL.B., Gowling Lafleur Henderson LLP; Nicola Elkins CFRE, M.Sc, Benefaction Foundation; Ronald J. Kelly CA, PlanGiv Capital Ltd.

Tax Planning for Unusual Gifts

ADVANCED

This session will focus on the legal and income tax requirements that must be met in the design of unusual gifts, including gifts of private company debt and shares, listed shares, ecological property and flow through shares. The session will identify practical planning considerations and will provide a review of Canadian tax policy in this area and a sense of where it may be headed.

David P. Stevens LL.B., Gowling Lafleur Henderson LLP

Accountable Accounts - Reviewing An Executor's Accounts

GENERAL

Many charities sign off on accounts received from executors because they are simply happy to obtain the residuary bequest. However, buried in the accounts can lie significant issues or other opportunities to maximize the amount received under the gift. This workshop will take participants through a sample set of accounts and highlight the issues which can often arise, and how to deal with them.

Roger Lee LL.B., Davis LLP

2:00 – 3:00

Don d'actions accréditives : Le meilleur des deux mondes ?

AVANCÉ

Devez-vous acceptez les dons en actions accréditives ? Malgré les avantages fiscaux supérieurs que procure cette forme de don en valeurs mobilières, quels sont les risques associés à ces produits pour votre organisme et pour vos donateurs?

Natalie Hotte, Banque Nationale Gestion privée 1859

Dealing with the Subject of Death: Thanatology 101 for Fundraisers and Professional Advisors

INTRODUCTORY

'In this world nothing can be said to be certain, except death and taxes.' Benjamin Franklin. And yet, we hate to think about either! This interactive session will aim to help us become better fundraisers and professional advisors through death education. As a group, we will try to break down our personal barriers in speaking about death and examine the grieving process. We will also look at various cultural and religious views on death and dying and discuss how to speak to donors about death in the context of gift planning and/or memorial gifts. Disclaimer: this session surrounds a sensitive topic and may be difficult for attendees experiencing personal grief.

Janice L. St. Denis CFRE, McMaster University

Integrated Gift Planning the Wal-Mart Way: How to Use Multi-media to Promote Bequests Without Breaking the Budget

INTERMEDIATE

SOS Children's Villages provides a case study that's applicable to gift planners who aspire to a more ambitious program within the constraints of a limited time and budget. We'll examine a gift planning program that is lean, strategic and synergistic that makes use of just about every available donor touch point to cultivate loyalty and commitment – and to leverage that loyalty into higher order giving. And the best thing is – NONE of this is rocket science!

Jose van Herpt CFRE, Good Works; Boyd McBride, SOS Children's Villages Canada

Finding and Receipting Non-qualifying Securities

INTERMEDIATE

An official donation receipt can only be issued to a donor of a non-qualifying security if the security is an excepted gift or, if within 60 months of acquiring the non-qualifying security, certain conditions were present. This workshop will provide you with an overview of what is a non-qualifying security gift, where to seek them out, and how to properly receipt them. You will leave equipped with new confidence and passion enabling you to comfortably seek out these potentially lucrative gifts.

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

Managing and Mediating Your Bequest

INTERMEDIATE

When a dispute arises between the interests of the estate, the personal beneficiaries, the charitable beneficiaries and other stakeholders, knowing how and finding ways to resolve the disputes and finding practical and cost–effective alternatives to litigation is imperative. Explore through case examples what you need to know about the benefits of a mediated solution and best practices to effectively engage in this alternative dispute resolution process.

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

Asking with Power!

GENERAL

Trained sales professionals inspire, motivate and then effectively close the deal. Gift planners are expected to do the same. Finally, here is training based on a relational sales model adapted to philanthropy. You will learn to establish the kind of comfort and trust in your prospect that frees them to tell you what inspires them and would motivate their gift. You will also learn to welcome objections and ask for the gift with confidence.

Neil Williams CFRE, SAIT Polytechnic

3:45 – 4:45

L'administration des successions au Québec

INTERMÉDIAIRE

La conférence portera sur l'administration et la liquidation des successions au Québec, du point de vue des organisations sans but lucratif. Les thèmes abordés seront : Quoi faire lorsqu'on apprend qu'on est légataire, et les documents à obtenir afin d'avoir un aperçu complet de la succession ; les droits et obligations des légataires; quoi faire lorsqu'on est nommé liquidateur d'une succession, les étapes à suivre dans l'administration de la succession ; les droits et obligations des liquidateurs ; exemples de cas vécus et problématiques à éviter.

Elisabeth Evans-Olders LL.B., Borden Ladner Gervais LLP

Life Insurance Faces Some Serious Challenges: Implications for Planned Giving

INTERMEDIATE

Sustained low interest rates and the adoption of international accounting standards are creating a "perfect storm" for the insurance industry resulting in rising premiums, lower dividends, reduced guarantees, and increased volatility in values. Ahead lie unspecified changes to the rules for exempt life insurance. What are the implications for life insurance as a tool for charitable giving? What attention must be given to your portfolio of policies? How should valuations and your gift acceptance policy be adjusted?

Jeff Sniderman MBA, CFP, TEP, EF'C, CLU, CH.F.C., CIBC Wood Gundy Financial Services Inc.

Drafting Issues for Donor Restricted Gifts

INTERMEDIATE

This session will provide an explanation of the drafting issues when preparing donor restricted gifts, including an understanding of the differences between a restricted and an unrestricted gift, the different types of donor restricted gifts, what provisions should be included in donor restricted gift agreements, as well as related issues such as management considerations involving donor restricted gifts. The goal of the session is to assist gift planners and fundraisers to be better equipped to create the best donor restricted gifts that they can.

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

Gift Planners...Tune in to Radio WIFM ('What's In (it) For Me')

INTERMEDIATE

In an engaging, enlightening and entertaining session you will look at how to relate to financial advisors and maximize gifts from them. Learn the key motivators for financial advisors that move charitable giving from their basket to their business plan; identify the 'right' advisors and qualify them; and discover concepts and tools that will get the attention of financial advisors and legal professionals. Currently a Planned Giving Officer with the Canadian Cancer Society, Larry succeeds with advisors because he 'speaks their language'.

Larry Amstutz, Canadian Cancer Society, BC & Yukon

Who Owns Mrs Jones?

GENERAL

It's a no-brainer. Of course donor relationships and a donor-centred program are important for effective planned giving. You've read all the books. You keep up with the blogs. You know it's important to thank donors promptly. But are you in competition with your colleagues for gifts? Who owns Mrs. Jones? In this session we'll discuss two case studies, and explore how some of the top charities around the world are living and working a donor-centric model to maximize revenue.

Gwen Chapman, GC Consulting

Write a Cheque? The New Philanthropist Goes Further

GENERAL

They are engaged, involved and want to be a catalyst for meaningful change and impact that lasts. Today's progressive female philanthropists are leading the charge of the "changing face" of the donor with means. They are creating a strategic plan for charitable gifts to be carried out in their lifetime and beyond. These are women who are getting together to discuss society's biggest challenges and the responsibility philanthropists have in the solution. They're choosing the problem they want to help solve, researching how best to solve it and involving themselves and their families deeply in the effort. Come and meet three such dynamic women who will share their philanthropic journey, touch on the mentors who have helped to shape their thinking, and why each of them believes so strongly in the responsibility that philanthropists have to hone in on an area that is important to them.

Facilitator: Rowena Griffiths CSA, Carleton University
Panelists: To be confirmed

FRIDAY

Half-Day Professional Advisor Session

7:00 - 1:00

Workshop Sessions

9:15 – 10:45

Qui dit que les dons planifiés signifient seulement les dons différés ?!

AVANCÉ

Les dons planifiés peuvent et vont générer des dons considérables si les professionnels alliés et les directeurs de dons planifiés cherchent des opportunités dans le marché des affaires. Les donateurs qui détiennent des compagnies de gestion (HOLDCOS) ont des avantages fiscaux considérables en distribuant leur patrimoine à leur famille ainsi qu'à leur cause préférée. Pourquoi ne développons-nous pas davantage ces dons? Joignez-vous à nous au cours d'un atelier interactif sur une idée ingénieuse de planification successorale – nous expliquerons ce concept et ferons une séance de remue-méninges sur les défis et les opportunités pour nous afin de guider les donateurs à réaliser leur don ultime.

Jean Roy, Services financiers David Forest; Silvia Ugolini B.C.L, LL.B, Pl.fin, TEP, Université Concordia

Receipting Challenges: How to Receipt Donations of Unique Estate Assets

INTERMEDIATE

In this session, we will provide attendees with an overview of the tax and receipting rules applicable to estates in general and then move on to specific types of gifts and the challenges associated with receipting for those gifts. We will discuss the timing of the issuance of receipts, and how to receipt for income earned on a gift not yet distributed by an estate. Specific scenarios will include the following: Gifts of shares from the residue of an estate – valuation issues; gifts to charity out of a testamentary trust where the charity is the residual beneficiary of the trust; gifts of RRSPs and RRIFs; gifts of registered pension plans (which are not to be confused with RRSPs and RRIFs). Please bring difficult estate gift receipting issues and challenge us with your questions on unique estate gifts.

Rachel Blumenfeld LL.B., and Amanda Stacey LL.B., Miller Thomson LLP

Deeds of Gift: What Are They and Why Should You Use Them?

ADVANCED

Every gift planner and professional advisor in philanthropy has grappled with a poorly worded "Gift Agreement", "Fund Agreement" or other type of gift document at some point. Templates for agreements and deeds are sometimes shared, adapted and used by charities without considering what the document means for the charity and the donor. This workshop will explain the legal issues surrounding the use of these documents, and provide practical tips for revising your charity's templates.

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

Secrets from the 'Other' Side

ADVANCED

Paul Nazareth was a full time Gift Planner with charities for 12 years. Yet when he crossed to the 'other' side in 2011 he found many stories of gifts in jeopardy for reasons that would shock experienced fundraisers. He has gathered those stories and will share the lessons learned to help CAGP-ACPDP™ members close more planned gifts. On a positive note, charities are more powerful then they think, we'll talk about why.

Paul Nazareth, Scotia Private Client Group

21st Century Thinking on Legacy Giving: A Practical, Hands-on Approach to Getting More Planned Gifts with a Contrarian's Approach

GENERAL

This panel presentation will set the stage on how any organization can plan to move from macro to micro to singular marketing for planned gifts. Participants will get an inside look at legacy programs from Canada, the US, the UK and other countries. The session will also let individuals plan their own cross-channel, integrated legacy program before walking out the door. And throughout all of this session, everyone will learn to find middle and major gift donors at the same time they uncover more planned gifts!

Michael Johnston, Hewitt and Johnston Consultants; Other panelists to be confirmed

Planned Giving in the Small Shop

GENERAL

Too busy to get to planned giving? Aren't sure how to actually do it in between special events, direct mail, newsletters, meetings and grants? Having worked in one-Mann shops and as a planned giving specialist, Cathy offers pragmatic tips, a check-list and suggestions to help you make sure planned giving gets the attention it deserves in your fund development program. And once you're full of great ideas on how to ramp up your own planned giving program, Willard VanderPloeg will highlight an innovative and highly collaborative radio-based campaign shared with 13 other small hospitals across mid-western Ontario to promote legacy gifts: Bayshore's Healthy Tomorrows.

Cathy Mann CFRE, Cathy Mann & Associates; Willard VanderPloeg, Owen Sound Regional Hospital Foundation

RBC Corporate Donations: The Changing Landscape and How to Get a YES in the New Environment

GENERAL

The corporate philanthropy landscape has changed and it is becoming increasingly competitive for charities to access corporate donations. Corporations have an increased focus on creating measurable impacts and shared value. This session will feature how corporate giving activities are creating value for both the business and the community it services and what charities need to do to get the YES in the new environment.

Wafa Kadri, RBC Foundation

Complete speaker biographies can be found online at **www.cagp-acpdp.org**

2013 Conference Committees

A special thank you to our volunteer committees who have planned an exceptional conference and experience for you:

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Conference Social Events

Make connections at our social events

Exhibit Area – the hub of the conference!

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

Welcome Reception

WEDNESDAY APRIL 17 3:15

Enjoy a warm welcome to the National Capital Region and the 20th Annual National CAGP-ACPDP™ conference. Meet and mingle with our exhibitors and sponsors while connecting with old and new colleagues and friends.

A Capital Dine Around

WEDNESDAY APRIL 17 6:30

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

PRICE: VARIOUS DEPENDING ON RESTAURANT

CAGP-ACPDP™ Reception and Banquet

THURSDAY APRIL 18 6:00

Join us in the exhibit area for a reception, followed by dinner and high-energy entertainment with Zero Gravity Circus.

A duo of versatile, multi-skilled circus artists will display their fearless juggling skills, hilarious Saran wrap escape and end with a fiery finale. This professional performance is not capable of a single dull moment!

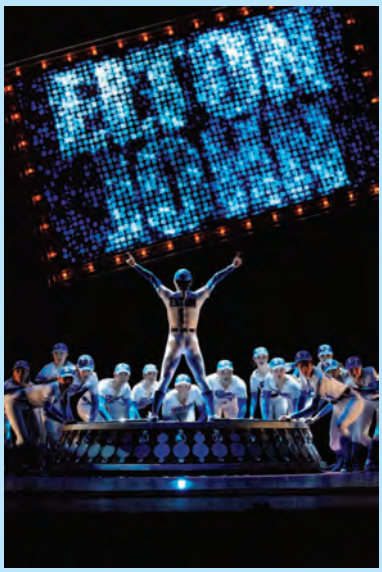
Alberta Ballet

LOVES LIES BLEEDING

Friday April 19

7:00 Reception

8:00 Performance



ALBERTA BALLET COMPANY ARTISTS

The undeniable joy of pop-rock meets the breathtaking athleticism of ballet in the sequined spectacle, Love Lies Bleeding. Alberta Ballet's artistic director Jean Grand-Maître, choreographer of the Vancouver 2010 Olympic Opening Ceremonies, conjures a romping and visually spectacular tribute to the work of Sir Elton John and Bernie Taupin. Featuring 14 classic songs, this wild and whimsical piece explores the trials, victories, and sacrifices of achieving super stardom.

Price: $57.17 (plus HST)

RECEPTION SPONSORED BY:

CAGP-ACPDP™ Ottawa RoundTable
National Arts Centre Foundation

Creating Capital Connections

CAGP-ACPDP™ Conference • April 17-19, 2013 • National Capital Region

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.

* French language session

WEDNESDAY APRIL 17 *9:15 - 10:45*

____Les dons planifiés pour petites organisations * (Débutant) *W1.1*
____Gift Planning Technical Overview (Introductory) *W1.2*
____Let's Face It! Making Connections Through Donor Visits (Intermediate) *W1.3*
____Gifts by Will (or De-Mystifying the Confusion) (Intermediate) *W1.4*
____New & Interesting Case Studies (Advanced) *W1.5*
____Your Donors Have Spoken (General) *W1.6*

WEDNESDAY APRIL 17 *11:15 - 12:15*

____Les dons planifiés, démystifiés * (Débutant) *W2.1*
____Upsizing Bequests by Using Insurance (Intermediate) *W2.2*
____High Net Worth Donors (Intermediate) *W2.3*
____Forming Allies and Centres of Influence (Intermediate) *W2.4*
____Planning Without Borders – Part I: Interprovincially (Advanced) *W2.5*
____The Elder and Vulnerable Donor (General) *W2.6*

WEDNESDAY APRIL 17 *2:15 - 3:15*

____Le droit de rêver * (Intermédiaire) *W3.1*
____Gift Acceptance Policies (Introductory) *W3.2*
____Estate Administration for Charities (Intermediate) *W3.3*
____Cultivating the New Cadre of Leaders (Intermediate) *W3.4*
____Values, Voice and Venture in an Emerging Generation (Advanced) *W3.5*
____Donor Relations - Maybe it is Rocket Science? (General) *W3.6*

THURSDAY APRIL 18 *9:15 - 10:45*

____Allez rencontrer les donateurs * (Tous) *W4.1*
____Practical Implications of CRA New Governance Rules and Top 10 CRA Compliance Issues (Intermediate) *W4.2*
____Numbers That Count (Intermediate) *W4.3*
____The Motivational Power of Donor Presentations (General) *W4.4*
____Social Enterprise and Charities (General) *W4.5*
____The Leadership Connection (General) *W4.6*

THURSDAY APRIL 18 *11:15 - 12:15*

____Intégration des dons planifiés dans le cadre d'une campagne majeure * (Intermédiaire) *W5.1*
____No More Excuses - The Time to Talk to Prospects is Now! (Introductory) *W5.2*
____How to Talk to Your Donors About Investing (Intermediate) *W5.3*
____Private Foundations and Endowment Funds (Intermediate) *W5.4*
____Tax Planning for Unusual Gifts (Advanced) *W5.5*
____Accountable Accounts - Reviewing An Executor's Accounts (General) *W5.6*

THURSDAY APRIL 18 *2:00 - 3:00*

____Don d'actions accréditives * (Avancé) *W6.1*
____Dealing with the Subject of Death (Introductory) *W6.2*
____Integrated Gift Planning the Wal-Mart Way (Intermediate) *W6.3*
____Finding and Receipting Non-qualifying Securities (Intermediate) *W6.4*
____Managing and Mediating Your Bequest (Intermediate) *W6.5*
____Asking with Power! (General) *W6.6*

THURSDAY APRIL 18 *3:45 - 4:45*

____L'administration des successions au Québec * (Intermédiaire) *W7.1*
____Life Insurance Faces Some Serious Challenges (Intermediate) *W7.2*
____Drafting Issues for Donor Restricted Gifts (Intermediate) *W7.3*
____Gift Planners…Tune in to Radio WIIFM (Intermediate) *W7.4*
____Who Owns Mrs Jones? (General) *W7.5*
____Write a Cheque? The New Philanthropist Goes Further (General) *W7.6*

FRIDAY APRIL 19 *9:15 - 10:45*

____Qui dit que les dons planifiés signifient seulement les dons différés ?! * (Avancé) *W8.1*
____Receipting Challenges (Intermediate) *W8.2*
____Deeds of Gift (Advanced) *W8.3*
____Secrets from the 'Other' Side (Advanced) *W8.4*
____21st Century Thinking on Legacy Giving (General) *W8.5*
____Planned Giving in the Small Shop (General) *W8.6*
____RBC and Corporate Donations (General) *W8.7*

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

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

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

Job Title: _____

Organization: _____

Address: _____

City: _____ Prov: _____ Postal Code: _____

Telephone: ( ) _____ E-mail: _____

Special dietary or mobility requests: _____

Emergency Contact Information

Contact Name: _____

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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

Please complete the Conference Registration Fees

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CONFERENCE REGISTRATION FEES

	Early Bird (Until Feb 25, 2013)	Regular (After Feb 25, 2013)	
FULL CONFERENCE FEES			
Member or Gold Associate*:	$750	$850	$ _____
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	$ _____
GIFT PLANNING-ALL IN A DAY			
PRE-CONFERENCE - APRIL 16 8:00 – 5:15			
Member or Gold Associate:	$290	$290	$ _____
Non-member:	$325	$325	$ _____

EXTRA THURSDAY BANQUET TICKET*: _____ tkts x $106 $ _____

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

Subtotal Conference Fees	**$** _____	
14.975% QC HST - Registration number: 870678299RT0001	**$** _____	
Total Conference Fees	**$** _____	**A**

OPTIONAL SOCIAL ACTIVITY – BOOKING DEADLINE MAR 22

APRIL 19 7:00

Alberta Ballet-Love Lies Bleeding	_____ tkts x $57.17	$ _____	
13% ON HST – on optional social activity only		**$** _____	
Total Optional Social Activity		$ _____	**B**
Processing Fee		$ 5.00	**C**
Total Conference & Activity Fees (Total A,B,C)		**$** _____	

PAYMENT OPTIONS

☐ VISA ☐ MasterCard® ☐ Cheque (payable to CAGP Gatineau 2013)

Credit Card number:_____ Expiry date:_____

Name on card: _____

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

Cardholder Signature _____

Cancellation and Refund Policy

Notice of all cancellations must be received in writing. Before **MARCH 15 2013**, 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 2014 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 16 2013 - without exception. No-shows forfeit the full registration fee.

Please complete the Conference Registration Form

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