THE CHALLENGE OF CHANGE APRIL 14–16 2021

REIMAGINING THE FUTURE OF PHILANTHROPY

Start Time Atlantic Time Zone	End Time Atlantic Time Zone	Session Title	Presenter	Organization
12:00 PM	12:15 PM	Welcome	Sam Laprade, CFRE	
12:15 PM	1:15 PM	Plenary: Is Work Killing You? A Doctor's Prescription For Treating Workplace Stress	David B. Posen M.D.	
1:15 PM	1:45 PM	BREAK		
1:45 PM	2:45 PM	Social Justice Philanthropy - Key Concepts and Competencies	Shereen Munshi Holly McLellan Krista Bissiallon Jon McPhedran Waitzer	The Circle on Philanthropy and Aboriginal Peoples in Canada Youth and Philanthropy Initiative Canada Algoma Community Foundation Resource Movement
1:45 PM	2:45 PM	The Female Advisor Perspective – How A Shift of Power & Wealth Is Impacting The Financial & Philanthropic Planning Conversations	Serena Hak Joady Guyot Gillian Stovel Rivers, MA, CFP, CEA Betty-Anne Howard, CLU, CHS, CEA, CFP Janine Purves	CI Assante Wealth Management Surround Wealth Advisors, Assante Financial Management Ltd. CI Assante Wealth Management: Athena Planning Group CI Assante Capital Management Ltd.
1:45 PM	2:45 PM	Exploring the Why Behind Giving: Lessons for Legacy Planning	Richa Arora Arundel Gibson, CHRL, MBA	KPMG Canada
1:45 PM	2:45 PM	Using Social Media in Planned Giving - What You Need to Know	Christine Kang Jackie Mersereau	SickKids Foundation Nature Conservancy of Canada
2:45 PM	3:15 PM	BREAK		
3:15 PM	4:15 PM	Crystal Ball - Future Trends	Patrick O'Connor, MFA-P, FEA, CFP, CLU, TEP, ChFC	Blackwood Family Enterprise Services
3:15 PM	4:15 PM	Small Shop Stewardship	Rochelle Greaves, BA Mathematics Roxanne Tackie	Story Point Consulting
3:15 PM	4:15 PM	Philanthropic Psychology: Lessons from the Therapist's Couch	Leah Eustace, ACFRE Aimée Lindenberger, CFRE	Blue Canoe Philanthropy Refocus Communications & Fundraising
3:30 PM	3:50 PM	**Sponsored Concurrent Session -** Driven By Purpose: Stories to Inspire Your Donors to Make Planned & Strategic Gifts	Ryan Fraser CFP CIM MFA-P	Quiet Legacy Planning Group
3:55 PM	4:15 PM	**Sponsored Concurrent Session -** Scoring and Finding your Best Planned Giving Prospects	Allen Davidov MBA, CM	Environics Analytics
4:15 PM	5:15 PM	SOCIAL TIME		

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11:30 AM	**12:00 PM**	**Early Bird Sponsored Session:** How to get your CFRE	**Sonya Swiridjuk, CFRE**	**CFRE**
11:30 AM	**12:00 PM**	**Early Bird Sponsored Session:** Strategic Philanthropy, the Evolution of Planned Giving: Establishing a Truly Integrated Planned Giving Program at Your Organization	**Ed Sluga, CFRE**	**PGgrowth Inc.**
12:00 PM	**12:15 PM**	**Welcome**	**Sam Laprade, CFRE**	
12:15 PM	**1:15 PM**	**Plenary: Creating a More Inclusive Sector**	**Hon. Senator Ratna Omidvar C.M., O.Ont.**	
1:15 PM	**1:45 PM**	**BREAK**		
1:45 PM	3:15 PM	Deep Dive Session: Uncovering Hidden Treasure: Top 5 Basic Tools to Tackle Estate Administration	Yolanda Benoit Patricia Ward	The BC SPCA Heart and Stroke Foundation
1:45 PM	3:15 PM	Deep Dive Session: Conversations with Widows and Widowers Around Death, Grief and Legacy Giving	Holly Wagg, CFRE Janice L. St-Denis, CFRE Charlotte Paul CIM®, CDFA Geoff Love, MES Jill Nelson, CFRE	Good Works McMaster University Perspective Wealth Management, Raymond James Ltd. Love Environment The Princess Margaret Cancer Foundation
1:45 PM	3:15 PM	Deep Dive Session: Above and Beyond: Dealing with Inappropriate Behaviour from Donors and Volunteers	Peggy Killeen, CFRE Liz LeClair, CFRE Jen Pederson, CFRE	CAGP Foundation QEII Foundation Saskatoon Community Foundation
1:45 PM	3:15 PM	Deep Dive Session: The Hybrid Endowment	Brenda McEachern LLB, TEP	RBC Wealth Management Financial Services Inc.
3:15 PM	**3:45 PM**	**BREAK**		
3:45 PM	**4:45 PM**	**Plenary: Decolonizing Wealth**	**Edgar Villanueva**	**Leverage Philanthropic Partners**
4:45 PM	**5:45 PM**	**SOCIAL TIME**		

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Start Time Atlantic Time Zone	End Time Atlantic Time Zone	Session Title	Presenter	Organization
11:30 AM	12:00 PM	Early Bird Sponsored Session (TBC)	TBC	
11:30 PM	12:00 PM	Early Bird Sponsored Session (TBC)	TBC	
12:00 PM	12:15 PM	Welcome	Sam Laprade, CFRE	
12:15 PM	1:15 PM	Plenary: Working with Diversity: An Advisor's Perspective	Yogesh Bhathella CPA, CGA, CFP, TEP Sukhminder S. Virk LL.B.	KPMG Canada Soul Counsel
1:15 PM	1:45 PM	BREAK		
1:45 PM	2:45 PM	Gender, Power and Wealth: Slaying Your Assumptions to Raise More Money	Jenny Mitchell, CFRE, DMA Justin Pilon	Chavender Ivey Business School at Western University
1:45 PM	2:45 PM	Reconciliation Through Gift Planning: How Settlers Can Give Back Through Planned Gifts	Michelle Johnson, CFRE Sharon Redsky	Follow Through Philanthropy Redsky Fundraising
1:45 PM	2:45 PM	Building a Donor Focused Strategy for Future Legacy Success	Kimberley Blease Stephen George	Blakely Good Leaders
1:45 PM	2:45 PM	Using CAGP's Life Insurance Guidelines to Increase Gifts and Reduce Risk	Yolanda Benoit Ryan Fraser, CFP, CIM, MFA-P Brenda McEachern LLB, TEP Jill Nelson, CFRE	The BC SPCA Quiet Lagacy Planning Group RBC Wealth Management Financial Services Inc. The Princess Margaret Cancer Foundation
2:45 PM	3:15 PM	BREAK		
3:15 PM	4:15 PM	Closing Plenary: Reimagining the Future of Philanthropy	Naki Osutei Andrew Chunilall CPA, CA Natasha Smith LL.B.	TD Bank Group Community Foundations of Canada Miller Thomson LLP

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On Demand Sessions	Length of Session	Session Title	Presenter	Organization
On Demand	30-45 min.	Gift Planning 101: Talking to donors about gift planning	Paul Nazareth	CAGP
On Demand	30-45 min.	Gift Planning 101: Common Types of Gift Vehicles	Ryan Fraser CFP CIM MFA-P	Quiet Legacy Planning Group
On Demand	30-45 min.	Gift Planning 101: Basics of marketing	Claude Drouin	University of Ottawa
On Demand	30-45 min.	Gift Planning 101: Basics of Estate Administration	Colleen DeJager	PGgrowth Inc.
On Demand	45 min. - 1 hour	Donor Advised Funds: Perspectives From Providers and Charities	Michael Blatchford LL.B.	Norton Rose Fulbright Canada LLP
On Demand	45 min.	Discovery Meetings: Get Out From Behind Your Desk and Uncover Prospects and Planned Gifts	Eli Clarke	University of Toronto
On Demand	45 min. - 1 hour	Flexibility in Endowment Strategy	Nicole K. D'Aoust LL.B Gwenyth Stadig LL.B	Miller Thomson LLP
On Demand	1 hour	Designating a Charity as Beneficiary - Tips and Traps for Gifts from Registered Plans	Amanda Stacey J.D. (Juris Doctor)	Norton Rose Fulbright Canada LLP
On Demand	1 hour	A Collaborative and Practical Approach: How RBC Integrates Philanthropic Planning into a Holistic Financial Plan	Jennifer Button Brad Offman MA, MBA, CFRE, MFA-P	