



Start Time Mountain Time	End Time Mountain Time	Session Title	Presenter	Organization
9:00 AM	9:15 AM	Welcome	Sam Laprade, CFRE	
9:15 AM	10:15 AM	Plenary: Is Work Killing You? A Doctor's Prescription For Treating Workplace Stress	David B. Posen M.D.	
10:15 AM	10:45 AM	BREAK		
10:45 AM	11:45 AM	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
10:45 AM	11:45 AM	The Female Advisor Perspective – How A Shift of Power & Wealth Is Impacting The Financial & Philanthropic Planning Conversations	Serena Hak Joody 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.
10:45 AM	11:45 AM	Exploring the Why Behind Giving: Lessons for Legacy Planning	Richa Arora Arundel Gibson, CHRL, MBA	KPMG Canada
10:45 AM	11:45 AM	Using Social Media in Planned Giving - What You Need to Know	Christine Kang Jackie Mersereau	SickKids Foundation Nature Conservancy of Canada
11:45 AM	12:15 AM	BREAK		
12:15 AM	1:15 PM	Crystal Ball - Future Trends	Patrick O'Connor, MFA-P, FEA, CFP, CLU, TEP, ChFC	Blackwood Family Enterprise Services
12:15 AM	1:15 PM	Small Shop Stewardship	Rochelle Greaves, BA Mathematics Roxanne Tackie	Story Point Consulting
12:15 AM	1:15 PM	Philanthropic Psychology: Lessons from the Therapist's Couch	Leah Eustace, ACFRE Aimée Lindenberger, CFRE	Blue Canoe Philanthropy Refocus Communications & Fundraising
12:30 AM	12:50 AM	<b>Sponsored Concurrent Session</b> - Driven By Purpose: Stories to Inspire Your Donors to Make Planned & Strategic Gifts	Ryan Fraser CFP CIM MFA-P	Quiet Legacy Planning Group
12:55 AM	1:15 PM	<b>Sponsored Concurrent Session</b> - Scoring and Finding your Best Planned Giving Prospects	Allen Davidov MBA, CM	Environics Analytics
1:15 PM	2:15 PM	SOCIAL TIME		



Start Time Mountain Time	End Time Mountain Time	Session Title	Presenter	Organization
8:30 AM	9:00 AM	<b>Early Bird Sponsored Session:</b> How to get your CFRE	Sonya Swiridjuk, CFRE	CFRE
8:30 AM	9:00 AM	<b>Early Bird Sponsored Session:</b> Strategic Philanthropy, the Evolution of Planned Giving: Establishing a Truly Integrated Planned Giving Program at Your Organization	Ed Sluga, CFRE	PGgrowth Inc.
9:00 AM	9:15 AM	<b>Welcome</b>	Sam Laprade, CFRE	
9:15 AM	10:15 AM	<b>Plenary: Creating a More Inclusive Sector</b>	Hon. Senator Ratna Omidvar C.M., O.Ont.	
10:15 AM	10:45 AM	<b>BREAK</b>		
10:45 AM	12:15 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
10:45 AM	12:15 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
10:45 AM	12:15 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
10:45 AM	12:15 PM	Deep Dive Session: The Hybrid Endowment	Brenda McEachern LLB, TEP	RBC Wealth Management Financial Services Inc.
12:15 AM	12:45 PM	<b>BREAK</b>		
12:45 AM	1:45 PM	<b>Plenary: Decolonizing Wealth</b>	Edgar Villanueva	Leverage Philanthropic Partners
1:45 PM	2:45 PM	<b>SOCIAL TIME</b>		



Start Time Mountain Time	End Time Mountain Time	Session Title	Presenter	Organization
8:30 AM	9:00 AM	Early Bird Sponsored Session (TBC)	TBC	
8:30 AM	9:00 AM	Early Bird Sponsored Session (TBC)	TBC	
9:00 AM	9:15 AM	Welcome	Sam Laprade, CFRE	
9:15 AM	10:15 AM	Plenary: Working with Diversity: An Advisor's Perspective	Yogesh Bhathella CPA, CGA, CFP, TEP Sukhminder S. Virk LL.B.	KPMG Canada Soul Counsel
10:15 AM	10:45 AM	BREAK		
10:45 AM	11:45 AM	Gender, Power and Wealth: Slaying Your Assumptions to Raise More Money	Jenny Mitchell, CFRE, DMA Justin Pilon	Chavender Ivey Business School at Western University
10:45 AM	11:45 AM	Reconciliation Through Gift Planning: How Settlers Can Give Back Through Planned Gifts	Michelle Johnson, CFRE Sharon Redsky	Follow Through Philanthropy Redsky Fundraising
10:45 AM	11:45 AM	Building a Donor Focused Strategy for Future Legacy Success	Kimberley Blease Stephen George	Blakely Good Leaders
10:45 AM	11:45 AM	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
11:45 AM	12:15 PM	BREAK		
12:15 PM	1:15 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



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	