

Monday

Tuesday

Wednesday

Thursday

07:00

⌚ 07:00 - 08:00

**REGISTRATION OPENS + BREAKFAST**

07:00

⌚ 07:00 - 07:45

**EARLY BIRD SPONSORED SESSION****Legacy Donors in Canada - Who They Are and What Makes Them Tick?**Sponsored by **Environics**

Legacy giving has been a hot topic in recent years, and with the COVID-19 pandemic bringing mortality to the forefront, people are considering their lasting impact like never before. In this session, we will dive into key market trends across the country. In addition, we will take a deeper look at who is leaving a bequest to charity and answer key questions about how you can strengthen your relationship with these different audiences.

**Speaker: Jennifer Robins, MBA**

08:00

⌚ 08:00 - 09:00

**PLENARY: DR. WANDA THOMAS BERNARD****Combating Racism and Leading Systemic Change: What Strategies Will Work?**Sponsored by **BMO Private Wealth**

In this keynote, Dr Wanda Thomas Bernard will highlight awareness of the ways in which systemic racism shows up in the philanthropic sector, and suggest actions for leading change. She will create brave space for courageous conversations that will encourage systemic change. Dr Bernard will invite participants to critically reflect on ways in which we can reset our institutions to ensure they are intersectional and reflective of the rich diversity that make up Canadian society. Building on her social justice work that examines issues of privilege, she will inspire participants to consider ways they can use the privilege of the philanthropic sector in funding programs that empower people and communities, while creating systemic change.

09:15

⌚ 09:15 - 10:45

**MORNING SESSIONS A - 90 MINS**

5 different sessions to choose from:

**7.1. Telling the Perfect Legacy Story in 7 Simple Steps**Education level: **General / Général**Topic stream: **Building Relationships** - sponsored by **PGgrowth** / Établissement de relations - commandité par **PGgrowth** - Marketing & Communications / Marketing et communications

Human beings have been telling stories for tens of thousands of years. And now, thanks to advances in neuroscience, we know why! Stories have always been - and still are - the most powerful way we educate, entertain, persuade, and connect with each other. Join Fraser and Amanda as they help you build your own 7-step perfect story outline. Are YOU ready to craft your ultimate legacy story?

**Speakers: Fraser Green and Amanda Hatt****7.2. Building Sustainability by Breaking down Silos: Re-thinking fundraising through a radical re-focus on the retention of major, annual and legacy donors.**Education level: **General / Général**Topic stream: **Building Relationships** - sponsored by **PGgrowth** / Établissement de relations - commandité par **PGgrowth**

Our long term sustainability as non-profit organizations is under threat. Individual giving is declining and loyal giving is being eroded, which is bad news for gift planning. The best way to secure, grow and sustain philanthropic support has far more to do with being true to current donors than acquiring new ones. It's time to get real about breaking down the silos between annual, major and legacy giving. Donor retention can only be strengthened if development programs make building authentic relationship with stakeholders their single most important objective. We'll discuss how current concepts of donor-centrism, moves management and metrics need to evolve, and propose long term solutions to this major challenge.

**Speakers: Peggy Killeen, CFRE and James M. Langley**

### 7.3. Estate Fundamentals

Education level: [Introductory / Introduction](#)

Topic stream: [Gift Planning Vehicles / Véhicules de planification de dons](#)

Whether a big or small shop, you often confront complicating factors during estate administration. During this session we'll review the fundamentals to understand the duties, obligations, and timelines during estate administration. We'll also catalogue the most common challenges charities face and how to address them with tact and professionalism. You will be provided with release and accounts checklists to aide in your own tools for estate administration. Do not miss this informative session to help you address your estate administration needs.

**Speakers: Angus Gordon, TEP**

*Institute accredited CE (1.5 credits)*

*Continuing Education Sponsor: **ADVOCIS***

### 7.4. Launch It or Leave It: Navigating Legacy Challenge Campaigns

Education level: [General / Général](#)

Topic stream: [Building Relationships - sponsored by \*\*PGgrowth\*\* / Établissement de relations - commandité par \*\*PGgrowth\*\*](#) - [Marketing & Communications / Marketing et communications](#)

Legacy challenge programs have been more prominent over the last few years, with impressive results across a wide array of non-profit organizations. These programs are effective because they meet a variety of donor needs and offer incentives that stimulate donor actions. This session will share strategies and learnings from a large multifaceted university, McGill University, and a major cultural institution, The National Ballet of Canada. The speakers will describe how Legacy Challenges can be effective in meeting multiple fundraising goals and strategies in a variety of settings. These include revitalizing a legacy giving program, galvanizing donor participation, increasing the average size of legacy gift commitments, unearthing existing legacy donors, and more.

**Speakers: Richard Lefebvre, CFRE and Christina Vroom**

### 7.5. The Imperative Evolution of Endowments

Education level: [General / Général](#)

Topic stream: [Legal Issues / Questions juridiques](#) - [Ethics & Judgement / Éthique et jugement](#)

There is roughly \$92 billion in tax-exempt capital sitting in endowments in Canada, inaccessible to civil society. Most endowments are legally restricted in perpetuity, making the sector 'asset rich and cash poor.' Approximately \$1 trillion in personal wealth will be transferred from one generation to the next in Canada between now and 2026 - it is time to rethink perpetual endowments. This 'coffee conversation' will discuss the opportunities and challenges with endowed funds, why the sector is 'asset rich and cash poor,' and what we can do about it. Using live examples, we will talk about modern approaches to philanthropy that enable pathways towards equitable outcomes for communities across turtle island. For Wealth Advisors and Will and Estate Planners who advise clients on charitable vehicles, as well as Operating charities considering setting up and endowment.

**Speakers: Leanne Burton, Kris Archie and Richard Bridge**

10:45

🕒 10:45 - 11:15

### BREAK

Time to refresh and network

11:15

🕒 11:15 - 12:15

### MORNING SESSIONS B - 60 MINS

5 different sessions to choose from:

#### 8.1. Bequests are Just the Beginning: Why Bequest Intentions are a Starting Point to a Beautiful Friendship

Education level: [Intermediate / Intermédiaire](#)

Topic stream: [Gift Planning Vehicles / Véhicules de planification de dons](#)

Receiving a bequest intention is sometimes viewed as the mountaintop gift. A bequest to charity means the donor loves you as much as their other loved ones, perhaps more, and is an invitation to deepen the relationship! The donor conversation about future gifts can quickly change to a conversation about lifetime giving as well. Most donors would choose to "give with a warm hand" if that option exists. Donors may explore whether they can increase lifetime donations or consider donations of assets. This session will also include suggestions to start the donor conversation and the opportunity to practice those conversations.

**Speaker: Sherri Groz, CFP**

## 8.2. The Power of Legacy Videos

Education level: **General / Général**

Topic stream: **Marketing & Communications / Marketing et communications**

Research has demonstrated that the most effective way to inspire a donor to include a charity in their Will is to share stories of existing donors who have already done so. Couple that with the fact that video is not only the most powerful storytelling medium on the planet, but today, more accessible than ever before and we have a new, exciting, and highly effective means of inspiring legacy giving. Video storytelling is the future of Philanthropy and the future is here.

**Speakers: Michelle Bower Carter**

## 8.3. Barriers to Giving: Donors and Gift Planning

Education level: **General / Général**

Topic stream: **Building Relationships - sponsored by PGgrowth / Établissement de relations - commandité par PGgrowth**

Many donors struggle with the concept and process of gift planning. This interactive session identifies five barriers to giving - both from the perspective of the donor and the charity. The five barriers to "giving up" are: 1) the endowment effect, 2) cultural assumptions, 3) planning support, 4) complexity, and 5) emotions. Together we'll explore how these issues inhibit gift planning and identify how gift planners can anticipate their influence and increase success.

**Speakers: Malcolm Burrows**

*Institute accredited CE (1 credit)*

*Continuing Education Sponsor: **ADVOCIS***

## 8.4. Flow Through Shares Made Easy: How to Take Major Donors to the Next Level

Education level: **General / Général Intermediate / Intermédiaire**

Topic stream: **Gift Planning Vehicles / Véhicules de planification de dons**

In recent years, odds are you have heard about flow-through shares and how they can help major donors give up to three times more, at no additional cost. But how comfortable do you feel speaking about it with your donors? While Philanthropic Tax Planning has become a common, trusted method of giving for Canada's largest donors, it still remains a mystery for many professional fundraisers. And yet, since 2006, this strategy has created more than a \$1 billion in donations for Canadian registered charities. In this engaging, accessible talk, Peter Nicholson, President & Founder of the Foundation WCPD, will break down the basics of flow-through shares, how they work, why they exist and the tax policies that make this uniquely Canadian structure possible. By the end, you will not only have a greater understanding of flow-through shares, but also a toolkit for how to approach your major donors in the field.

**Speakers: Peter Nicholson**

*Institute accredited CE (1 credit)*

*Continuing Education Sponsor: **ADVOCIS***

## 8.5. Estate Gifts: Horror Stories and Amazing Cures!

Education level: **General / Général**

Topic stream: **Legal Issues / Questions juridiques**

Hear from a panel of three experts talk about their time in the trenches in planning and administering estate gifts. During an interactive conversation between a gift planner, an estate gift administrator, and a charity lawyer they will discuss examples of some of the most difficult estate gifts that they have dealt with and provide participants with useful strategies to plan better gifts. The topic will cover both common law and civil law estate gifts.

**Speakers: Kate Lazier, LLB, CFP, Christie Geen-Difede, Troy McEachren**

**12:30**

⌚ 12:30 - 14:15

## CLOSING PLENARY: TAREQ HADHAD

### Peace is Beautiful in Every Language

*Sponsored by **Raymond James Canada Foundation***

Born in Damascus, Tareq shares with us the story of how he found himself and his family far from home in Lebanon. Three years later, as a refugee family, the Hadhad's found themselves on the snowy streets even farther away in Antigonish, Nova Scotia.

From coast to coast, Tareq shares with us what can happen when people open their arms and offer kindness in another person's time of need.

Peace, it truly is beautiful in every language.

## DOWNTOWN HALIFAX

**15:00**

⌚ 15:00 - 17:00

### OPTIONAL SOCIAL ACTIVITY

Walking tour of downtown Halifax