07:00
07:00 - 08:00

REGISTRATION OPENS + BREAKFAST

08:00
08:00 - 09:15

PLENARY: MOHAMAD FAKIH

Leadership and a Kinder Capitalism for a New Canada after Covid
Sponsored by ***Private Giving Foundation, Available through TD***

Mohamad Fakih, President and CEO of Paramount Fine Foods

The truly inspiring displays of leadership during the past two years have come not from our elected leaders. They have come from ordinary people. These everyday leaders are all around us:
- The health professionals caring for the sick and vulnerable in hospitals.
- The business owners fighting to keep the doors open and employees on the payroll.
- The teachers overcoming impossible obstacles to engage their students in online learning.
- The generous donors supporting local food banks and countless other essential charities.

From this crisis, a new generation of leaders has emerged – people who have a new understanding of their capabilities, their strengths, and their ambition. They don't shy away from a problem. They run toward it.
The pandemic has reminded us of an essential truth: Leadership matters.

09:15
09:15 - 10:45

MORNING SESSIONS A - 90 MINS

5 different sessions to choose from:

1.1. MASTER CLASS: The Giving Brain: The Art and Science of Legacy Giving
Education level: Intermediate / Intermédiaire
Topic stream: Marketing & Communications / Marketing et communications

Thanks to brain imaging technology and the explosion of neuroscience, we know eight times more about how the human brain actually works than we did just 30 years ago. And you know what? A lot of planned giving best practice runs contrary to how donors actually think, feel and decide. This session offers you the chance to acquire the most up-to-date knowledge available about why people make legacy gifts – and more importantly, how you can persuade them to do so!

Speaker: Holly Wagg, MA, CFRE

1.2. Let's Be Honest – What We Can and Can't Control As Gift Planners
Education level: General / Général
Topic stream: Building Relationships - sponsored by **PGgrowth** / Établissement de relations - commandité par **PGgrowth**

Let's be honest, taxes, gift vehicles, and recognition do not inspire planned gifts. Why do we talk about them so much? Most donors will never tell us they have left a bequest. Why do we spend so much time and effort trying to get them to confirm their gifts? Join Jenny Mitchell and Eli Clarke in a safe space for an honest and open workshop to identify the psychology behind why we focus on counterproductive work, how we can stop doing it, and practical solutions and strategies to focus our work based on value and impact.

Speakers: Eli Clarke and Jenny Mitchell, CFRE, DMA

1.3. Gift Planning 101
Education level: Introductory / Introduction
Topic stream: Gift Planning Vehicles / Véhicules de planification de dons

This session is designed to give a high level, broad overview of gift planning to those new to the field. We will discuss differences between planned giving and other modes of fundraising as well as review the key terminology and basic understanding to make the most of other sessions at the conference. We'll arm you with practical ideas, brand new data from our sector and resources to jumpstart your understanding of planned and strategic giving.

Speakers: Charles O'Neil and Beth Proven, CFRE, BA, CIM

1.4. Navigating the Line Between Donor-centricity and White Saviourism
Education level: Intermediate / Intermédiaire
Topic stream: Marketing & Communications - Ethics & Judgement / Éthique et jugement

Legacy donors are amazing, altruistic people who really live their values. But no one individual can save the world. So how do we let donors know how much they are appreciated, and how much impact they can have, without casting them as a "saviour" and the organization and their beneficiaries as those it is necessary to "save"? Is it possible to engage donors meaningfully to achieve strong fundraising results without this divide?
We say, yes! Join this session to explore the intersection between effective donor engagement, community-centred fundraising, philanthropic psychology, and learn how to create messaging and approaches that bring them all together.

Speaker: Rickesh Lakhani and Leah Eustace, ACFRE

1.5. Planned Giving: Moving from a Passive to a Proactive Program

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

Where do you start? The Board wants a "planned giving" program. You have a couple of hundred supporters interested from 8 years ago. You currently are receiving 3 to 5 estates a year with no knowledge of why. You need to pivot during COVID to turn the PG program from passive into proactive. How can you make it happen? Lets take the journey from Board governance, engagement of counsel, data mining, develop a case for support and marketing materials, staff and volunteer training, implementation of proactive multi-channel engagement with prospective donors, stewardship, year 1 learnings and next steps.

Speakers: Doug Earle, ACFRE, CFRE and Ed Sluga, CFRE

10:45
10:45 - 11:15

BREAK + EXHIBIT HALL

Time to refresh, network and meet exhibitors

11:15
11:15 - 12:15

MORNING SESSIONS B - 60 MINS

5 different sessions to choose from:

2.1. MASTER CLASS: The Giving Brain: The Art and Science of Legacy Giving

Education level: Intermediate / Intermédiaire
Topic stream: Marketing & Communications / Marketing et communications

Thanks to brain imaging technology and the explosion of neuroscience, we know eight times more about how the human brain actually works than we did just 30 years ago. And you know what? A lot of planned giving best practice runs contrary to how donors actually think, feel and decide. This session offers you the chance to acquire the most up-to-date knowledge available about why people make legacy gifts – and more importantly, how you can persuade them to do so!

Speaker: Holly Wagg, MA, CFRE

2.2. - 5 Lessons Learned From Will Power to Apply to Your Marketing

Education level: General / Général
Topic stream: Marketing & Communications / Marketing et communications

The Will Power campaign launched across Canada in September 2021, with the goal of making it common practice for Canadians to leave a gift to charity when planning their estate. This broad-based marketing campaign has made a big splash, and learned a lot of lessons along the way. Come hear the top 5 lessons learned about raising interest in gifts in Wills, and nudging people to action. This session is suited for both charities and financial/legal advisors.

Speakers: Laurie Fox, MBA and Nancy Ho

2.3. Planned Giving with Life Insurance - Nothing but Opportunities

Education level: Intermediate / Intermédiaire Experienced / Avancé
Topic stream: Gift Planning Vehicles / Véhicules de planification de dons - Legal Issues / Questions juridiques

Canada's charitable tax credit regime provides great opportunities for clients to optimize their tax and estate plan. Clients can receive a charitable tax credit and feel good about helping the charities of their choice. Using life insurance for planned giving can help clients make a more substantial donation that is in alignment with their estate planning goals. In particular, the gifting of a life insurance policy can be an attractive option for clients as prospective donors. It's also an important strategic charitable giving tool. In this presentation, we are going to outline five planned giving opportunities with life insurance.

Speaker: Sanjana Bhatia, B.B.A, LL.B., LL.M (Tax), TEP

Institute accredited CE (1 credit)
Continuing Education Sponsor: **ADVOCIS**

2.4. Eat the Toad! How to Respond to the Angry Donor

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

It's the call no one wants to receive. How should you deal with the angry or disappointed donor? What can you do if the fault lies with another organization? Abundance Canada is a faith-based charitable foundation offering donor-advised services. Many of our donors work with us on a recurring basis and a recent client survey shows that 99% of donors were satisfied with Abundance Canada overall. We will share our experiences and strategies for successfully repairing and rebuilding donor relationships, including managing expectations.

Speakers: Rick Braun-Janzen, CFP and Sherri Grosz, CFP

2.5. The Age Advantage: Supporting Young Fundraisers in Planned Giving Conversations
Education level: Introductory / Introduction - Intermediate / Intermédiaire
Topic stream: Building Relationships - sponsored by **PGgrowth** / Établissement de relations - commandité par **PGgrowth**

With the influx of young professional fundraisers entering the workforce, how can we unlock the power of legacy giving conversations between individuals on different sides of the age spectrum? If you are young, young of heart, or trying to convince younger members of your team to have planned giving conversations, come to this session to hear about how two young-ish fundraisers have used age to their advantage when talking about gifts made at the end of life.

Speakers: Heather Powers and Siobhan Doherty

12:30
12:30 - 13:30

PLENARY: GOVERNMENT RELATIONS

A panel discussion by CAGP's Government Relations Committee - Unpacking Budget 2022
Sponsored by ***Abundance Canada***

April's federal budget tabled by the Liberal government was a plan to grow the economy and make life more affordable, and charities were also meaningfully included. Two measures are particularly relevant for CAGP: a proposal to boost charitable spending by increasing the disbursement quota; and a plan to strengthen partnerships in the sector by facilitating disbursements to non-qualifying donees. In this plenary sessions a panel from CAGP's Government Relations Committee will discuss these proposals, and their intended and expected impact for Canada's charities and for strategic charitable giving.

Moderator: Amanda Stacey, Chair, CAGP Government Relations Committee
Panelists: Susan Manwaring and Bobby Kleinman

13:30
13:30 - 14:15

DESSERT BREAK + EXHIBIT HALL

Time to refresh, network and meet exhibitors

Sponsored by ***Carters Professional Corporation***

14:15
14:15 - 15:15

AFTERNOON SESSIONS A - 60 MINS

5 different sessions to choose from:

3.1. Will Power Around the World
Education level: General / Général
Topic stream: Marketing & Communications / Marketing et communications

The Will Power campaign in Canada is a huge success. The 2021/22 program launched nationally on September 1, 2021 and will end May 31, 2022. In all, over 350 charities are participating. This session will look what we can learn from the 22 campaigns like Will Power around the world.

Speakers: David Love and Natasha van Bentum

3.2. Applying Care to Capital - How Philanthropic Advisors Help Donors Connect Purpose and Planning
Education level: General / Général
Topic stream: Building Relationships - sponsored by **PGgrowth** / Établissement de relations - commandité par **PGgrowth**

Financial institutions/Wealth Firms like RBC support clients not just with investment advice but also in many areas of their wealth planning objectives, including helping them incorporate their philanthropic goals into these plans for generations to come. More and more frequently, clients are considering charitable giving that will create a legacy that extends well beyond the next generation. In this session attendees will learn about the importance of planning conversations based on family values, their passions, and the next generation's need to be engaged so that lasting legacies are thoughtful and strategic.

Speakers: Jennifer Button and Nigel Fawcett

Institute accredited CE (1 credit)
Continuing Education Sponsor: **ADVOCIS**

3.3. Connecting Authentically: Gift Planning and Serving LGBTQ+ Donors

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

Do you and your organization speak about estate and gift planning from a heteronormative perspective? Let's hear what LGBTQ+ fundraising professionals, prospects/donors, and allied professionals do and say about their preferred practices in the sector. With video interviews and roundtable/virtual breakout discussions, we will explore ways to better understand and engage with this group.

Speakers: Colleen Cowman, PhD and Terry Tobin

3.4. How Fundraising and Marketing Can Work Together on PG Campaigns

Education level: General / Général
Topic stream: Building Relationships - sponsored by **PGgrowth** / Établissement de relations - commandité par **PGgrowth** - Marketing & Communications / Marketing et communications

Marketers are fundraisers too (and we want to help)! Find out how to really get your marketing & communications team on board, how to pitch your ideas to us, and how we can share accountability for the PG program's success!

Speakers: Ingrid Gingras and Rob Gottschalk

3.5. When Good Gift Plans Go Bad...

Education level: Intermediate / Intermédiaire
Topic stream: Gift Planning Vehicles / Véhicules de planification de dons

As a skilled gift planner, you have the ability to recommend different types of giving vehicles for each donor you work with. Customizing a gift plan to support your donor's financial needs and philanthropic goals is important. But what happens when 'good gift plans go bad'? In this session participants will learn about common pitfalls, warning signs and administration problems that can disrupt the gift planning process.

Speakers: Holly Greatrex, CFRE

15:30
15:30 - 16:30

AFTERNOON SESSIONS B - 60 MINS

5 different sessions to choose from:

4.1. Legacy Marketing 101 - Build it and They will Come

Education level: Introductory / Introduction
Topic stream: Marketing & Communications / Marketing et communications

Do the decision-makers at your organization still think of legacy fundraising as a "nice to have - but not urgent"? Here's what they should know: in a nutshell, your best groups of donors (Matures and Boomers) are passing on. These donors have been the engine room of annual, mid-level and major gifts programs, and nobody is sure yet whether the younger generations will fully replace them. That means - unless you secure gifts in these donors Wills - you'll soon have a huge gap in your annual program. And be sure - if you're not marketing legacies to your donors - other charities are.

Speakers: David Kravinchuk and Harvey McKinnon

4.2. Legal and Strategic Issues with Donations of Private Company Shares

Education level: Experienced / Avancé
Topic stream: Gift Planning Vehicles / Véhicules de planification de dons

In this session, two experienced practioners will discuss the "can we do this" aspect of donations of private company shares, as well as "should we do this" considerations. Practical straegies for dealing with donors and their advisors who may be less than forthcoming with respect to disclosing the information required to properly assess these potential gifts will be discussed as well as strategies to develop both board understanding of the issues and dealing with "one off" scenarios.

Speakers: Margaret Mason, JD, STEP and Malcolm Burrows

Institute accredited CE (1 credit)
Continuing Education Sponsor: **ADVOCIS**

4.3. Planned Gift Professionals as Settler Allies and Indigenous perspectives

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

This session will look at philanthropy through both the Indigenous and Settler perspectives. The goal: As a gift planning professional to explore allyship in the present and future and share some approaches that enable philanthropy to better contribute towards transformative change. As an Indigenous fundraising professional to highlight historical policies including estates under the Indian act, value of reciprocity and examples of philanthropic initiatives.

Speakers: Michelle Johnson, CFRE and Sharon Redsky

4.4. Foreign / Non-Resident Donors
Education level: Intermediate / Intermédiaire
Topic stream: Legal Issues / Questions juridiques

The operations of charities have become increasingly international in scope in recent years, including soliciting donations. Donors are also more aware of activities run by charities in other countries. This workshop reviews what fundraisers and gift planners for Canadian charities need to know in order to effectively structure gifts involving non-resident or foreign donors. They will gain an understanding of relevant gifting issues, due diligence and issues of concern to charities, and an overview of tax treaty treatment of cross border gifts.

Speakers: Theresa Man, B.Sc., M.Mus., LL.B., LL.M.

4.5. Elevating Leadership Workshop
Education level: Intermediate / Intermédiaire
Topic stream: Know your Charity / Connaissance de son propre organisme de bienfaisance

Our space is filled with talented people with strong skill sets, but there's always room for us to grow as leaders. As we all aspire to be 'good leaders,' often we are too busy to pause and identify what a 'great leader' is and further our leadership strengths, areas for growth and our blind spots. This interactive masterclass will assist participants in elevating their self-awareness as a leader, develop their own intentional leadership strategy, create a roadmap that increases leadership presence within the organization, and much more.

Speaker: Ange MacCabe, CHRM, ACC

16:30
16:30 - 18:00

WELCOME RECEPTION

Sponsored by ***QEII Foundation***

PIER 21

18:30
18:30 -

LOBSTER DINNER & KITCHEN PARTY

Join us for an optional outing to relax and meet new people

Sponsored by ***Good Works***