07:00
07:00 -

## REGISTRATION OPENS + BREAKFAST

07:00
07:00 - 07:45

## EARLY BIRD SPONSORED SESSION

**Flow-Through Share Donations - Enabling Transformational and Accelerated Philanthropy**
*Sponsored by* ***PearTree Canada***

Learn how advisors - wealth, tax, legal and charitable advisors - from across Canada are using the PearTree Canada Flow-Through Donation platform to assist their major gift donors/clients to efficiently and significantly increase their gifts, while lowering their after-tax cost of donation. This session will start with a simple explanation of what flow-through shares are and how the PearTree Canada Flow-Through Donation platform works. You will learn how to put this widely accepted major gift fundraising format into practice - from the perspectives of a donor, an advisor and a charity - and become a key component of your donor/client management strategy. Experience actual examples of success from leading institutions to grassroots organizations.

**Speakers: Les Ross, PFP, CIM, MFA-P and Robin Turack**

08:00
08:00 - 09:00

## PLENARY: DAVID CHILTON

**The Wealthy Barber Shares His Insights**
*Sponsored by* ***RBC Wealth Management, Royal Trust***

David Chilton, author of The Wealthy Barber and former Dragon on CBC's Dragons' Den

With his engaging wit and humour, David will share stories of his life experiences and business endeavors over the last thirty years as one of Canada's most popular authorities on personal finance.
RBC Wealth Management is proud to present this event as part of the collaboration between RBC Royal Trust and David Chilton, who have partnered to provide Canadians with more information about estate planning and the benefits of corporate executor services.

09:15
09:15 - 10:45

## MORNING SESSIONS A - 90 MINS

6 different sessions to choose from:

**5.1. MASTER CLASS: The Elephant in the Room: A Masterclass in Death & Dying**
Education level: General / Général
Topic stream: Building Relationships - sponsored by **PGgrowth** / Établissement de relations - commandité par **PGgrowth**

If you're ready to address the elephant in the room, get a little uncomfortable and take time and space to practice, then this intensive masterclass is for you. In this session, doulas and death educators will guide participants through a reflection to breakdown personal barriers and lead the group in a safe and open 'death café' style discussion on death and dying. The second half of the session will provide practical workplace scenarios and exercises where you will learn how to apply this new knowledge to fully show up for donors and clients.

**Speakers: Janice St-Denis, CFRE and Liz Finney**

**5.3. Wisdom from Recent Case Law About Fundraising Practices and Donor Relations**
Education level: Experienced / Avancé
Topic stream: Legal Issues / Questions juridiques

Are you a fundraiser? Are you interested in learning about the legal consequences that can arise from certain fundraising and donor relation practices? This workshop will briefly review the basic legal principles of fundraising on behalf of registered charities. Recent case law related to fundraising laws and the relationships between charities and donors will be analyzed and clear prevailing best practices will be extracted and explained.

**Speaker: Bryan Millman and Laura West**

### 5.4. Building Your Digital Legacy Factory: Using Online Tools to Find and Cultivate Legacy Prospects

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

This practical, sample-packed session will give you both the 'why' and 'how' of you can take a donor-centered, mass marketing approach to legacy giving. We'll explore the concept of the Legacy Factory, and I'll take you through the process of mapping a multi-channel, fully-integrated legacy journey. We'll explore what the data tells us about legacy audiences and why digital really does work for them. You'll learn how to maximize your website, email program, and lead generation tools for a legacy audience – along with how to combine them with offline tactics, for a seamless donor journey across every channel.

**Speaker: Charlotte Field**

### 5.5. "Things I Wish I Had Known Before I Became A CEO"

Education level: Intermediate / Intermédiaire
Topic stream: Know your Charity / Connaissance de son propre organisme de bienfaisance

Our sector is filled with talented people who aspire to leadership positions. This is good news as many who currently serve in those roles will move on or retire in the next decade, but leadership like anything is learned. In the same way we learn gift planning from those who have 'been there, done that', the best lessons in leadership are learned from others. This interactive workshop will hear from three experienced leaders on a host of topics including managing teams, setting direction, organizational clarity, working with boards, difficult conversations, and much more.

**Speakers: Darren Pries-Klassen, CFP, Ruth MacKenzie, Karen Lake and Eric Dean, CFRE, FAHP**

### 5.6. Crypto Philanthropy

Education level: General / Général
Topic stream: Gift Planning Vehicles / Vehicules de planification de dons

Crypto philanthropy is a growing movement and Canada is home to a huge crypto community! KPMG Canada professionals will guide participants on a crypto philanthropy journey where in Part One, attendees will gain a basic understanding of blockchain technology, cryptoassets and the potential for philanthropy. Part Two will cover an overview of the crypto philanthropy landscape and summaries of interviews with crypto-philanthropists including their motivations for giving and expectations of charities. Part Three will explain the tax considerations for crypto-philanthropists and why they require an experienced accountant with a deep understanding of cryptoassets. The session ends with some exciting examples for the application of crypto philanthropy!

**Speaker: Arundel Gibson, MBA, MFA-P, Joseph Micallef, FCPA, FCA and Kenneth Viegas**

*Institute accredited CE (1.5 credits)*
*Continuing Education Sponsor:* **ADVOCIS**

**10:45**
10:45 - 11:15

## BREAK + EXHIBIT HALL

Time to refresh, network and meet exhibitors.

*Refreshment Break Sponsored by* ***Fasken***

**11:15**
11:15 - 12:15

## MORNING SESSIONS B · 60 MINS

5 different sessions to choose from:

### 6.1. MASTER CLASS: The Elephant in the Room: A Masterclass in Death & Dying

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

If you're ready to address the elephant in the room, get a little uncomfortable and take time and space to practice, then this intensive masterclass is for you. In this session, doulas and death educators will guide participants through a reflection to breakdown personal barriers and lead the group in a safe and open 'death café' style discussion on death and dying. The second half of the session will provide practical workplace scenarios and exercises where you will learn how to apply this new knowledge to fully show up for donors and clients.

**Speakers: Janice St-Denis and Liz Finney**

### 6.2. KISS Principle (Keep It Simple, Steward) - Connecting with Faithful Older Donors

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

Grandma Alton in Kamloops is ready to meet Jesus, but her lawyer not so much. Older donors who attend worship regularly give the most, not just to their place of worship but generally. Which types of charities does Grandma Alton trust? How does she decide which causes to support? Does she know the seniors' apartment she lives in is actually a charity? Dr. Lori Guenther Reesor is an expert in faith-based giving. Come with questions!

**Speaker: Lori Guenther Reesor, B.Math, MTS, Dmin**

### 6.3. Online Wills: An Estate Lawyer's Perspective

Education level: General / Général Experienced / Avancé
Topic stream: Legal Issues / Questions juridiques

Technology touches every aspect of our lives, and has transformed entire industries such as travel, hospitality, entertainment, and financial services. Emerging technologies are now helping consumers address their legal needs – particularly in the area of estate planning. Arin Klug and Daniel Goldgut, estate planning lawyers and founders of Epilogue, will discuss some common concerns about the use of online Will platforms, how these platforms will transform estate planning in Canada, and what it all means for the charitable sector.

**Speakers: Arin Klug, J.D. and Daniel Goldgut**

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

### 6.4. Impact Investing by Charities: The New Frontier in Philanthropy

Education level: Intermediate / Intermédiaire
Topic stream: Legal Issues / Questions juridiques

More and more donors, as well as charities, are wanting to become involved in "impact investing" as part of the new frontier in philanthropy, but do not always understand what it involves. This session will explain what impact investing is intended to achieve through the dual purpose of achieving a financial return and charitable purpose. It will also explain how supply side impact investing differs from demand side impact investing, what forms impacting investing can take to achieve the charitable purposes of the charity, as well as the philanthropic intent of the donor. The session will explain some of the technical requirements involved with impact investing along with an explanation of a number of important collateral legal issues that should be considered.

**Speakers: Terrance Carter, B.A., LL.B, TEP**

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

### 6.5. Building the Designation for Professional Philanthropic Advisors

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

Since its launch in 2019, the Master Financial Advisor in Philanthropy – MFA-P – designation has been awarded to more than one hundred professional advisors, as well as a number of senior charitable gift planners. The intention of the program, as introduced by CAGP, Knowledge Bureau and Spire Philanthropy, was to both build and demonstrate excellence and high-level skills for advisors who provide philanthropic advisory services to their clients, as well as build a 'community of practice' that furthers knowledge and best practices in the profession and strengthens philanthropic giving in Canada. For those interested in learning more about the MFA-P, this session is for you; and Advisors and others who currently hold the designation are invited to strategize how CAGP can create a stronger connection with and between this unique group of professionals.

**Speaker: Brad Offman**

**12:30**
12:30 - 13:30

## PLENARY: ANNUAL GENERAL MEETING

### Canadian Association of Gift Planners - Annual General Meeting

When COVID-19 hit in spring 2019, CAGP led the charge in "pivoting" to a virtual Annual General Meeting to ensure we could continue to connect with our members and conduct official business. So, after two years, we're especially thrilled to be back in person with a live AGM in 2022! We invite you to join us for lunch for all the usual excitement an AGM offers: reports from the Board Chair and the President & CEO, election of new Board Directors, the 2021 audited financial report, and appointing auditors for next year. A brief report from the CAGP Foundation Board Chair will also follow, highlighting the Foundation's successes and the impact its having on strategic gift planning in Canada. This is a special time to officially gather as our CAGP community and questions and feedback area always welcome. We look forward to seeing you there!

13:30
13:30 - 14:30

### DESSERT BREAK + EXHIBIT HALL

Time to refresh, network and meet exhibitors

14:30
14:30 - 16:00

### FRANK TALKS

These TED-style talks are designed to inspire and challenge!

***"A reimagined future of philanthropy - Are we courageous enough for transformational change?"***

*Sponsored by* ***Miller Thomson LLP***

The 2021 National Conference on Strategic Philanthropy explored the need for a path to CAGP's vision of a better world through strategic charitable giving that is fairer, more just and inclusive. The response was a resounding: yes - now!

Transformative change requires a vision for where we want to be, a recognition of where we are now, and a willingness for current 'powers that be' to give up authority, influence and advantage to allow for new leaders, diverse voices, and greater equity.

To achieve a vision of fairness, justice and inclusivity, requires a courageous consideration that concepts such as white saviourism and white supremacy may play a role in society and in philanthropy that contributes to marginalization and exclusion.

Our speakers will share their experiences in gift planning and strategic philanthropy, and their insights and observations on how to achieve courageous, transformative change.

**Charity inequity - the winners and losers in charitable giving**
**Speaker: DeRico Symonds**

**What will you give up? - questioning the holders of authority and power**
**Speaker: Kris Archie**

**An advisor's perspective on money & meaning**
**Speaker: Serena Hak**

**A love letter to the world: one couple's take on modern giving**
**Speakers: Tania Cheng & Dana Decent**

**Funding transformation in the Community Impact Sector**
**Speaker: Annika Voltan**

**Fundraising aspect of the issue - where major gifts intersects with reciprocity**
**Speakers: Sharon Redsky**

18:00
18:00 - 19:00

### BANQUET RECEPTION

Time to celebrate!

*Sponsored by* ***CAGP Nova Scotia Chapter***

19:00
19:00 - 22:00

### BANQUET DINNER

*Sponsored by* ***Legacy Leaders***