2015 HALIFAX

INSIGHT TO IMPACT · APRIL 22-24

22nd Annual CAGP National Conference

MARRIOTT HALIFAX HARBOURFRONT HOTEL

CANADA'S ONLY CONFERENCE THAT SPECIALIZES IN STRATEGIC CHARITABLE GIFT PLANNING

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ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONS PLANIFIÉS

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The organizations listed were confirmed at time of publication.

INSIGHT
TO IMPACT
APRIL 22-24
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National Conference

BE INSPIRED. CREATE A VISION. MAKE AN IMPACT.

Welcome!

The desire to make the world better for future generations is what motivates those of us who work in the charitable sector as professional advisors, fundraisers and consultants. We take joy in ensuring donors make an impact with their decisions and provide insight into creating thriving, connected communities.

With educational and dynamic sessions, workshops and networking events, the 2015 CAGP Conference promises to offer more opportunities than ever to make an impact and bring insight to the gift planning profession.

Whether you are a new or seasoned fundraiser, professional advisor, board member or financial officer of a charity, this conference will provide opportunities at all levels to develop an invaluable network of contacts, meet like-minded professionals and share personal and professional experiences and aspirations.

We look forward to welcoming you to Halifax!


Co-chairs, Host Advisory Committee

Bonnie Boyd-Read *and*
Glenn Stewardson, CFP, FMA

2015 Host Advisory Committee

Committee Co-Chairs

Bonnie Boyd-Read	
Glenn Stewardson CFP, FMA	Assante Capital Management Ltd.

Committee Members

Crystal Aboud	Cape Breton University
Doris Cameron CFRE	Salvation Army
Toni P. Croft	Canadian Red Cross
Kelly Power	Canadian Breast Cancer Foundation - Atlantic Region
Jane Rafuse	Bonny Lea Farm
Lori Scott	QEII Foundation
Ann M. Vessey	Dalhousie University

2015 National Program Committee

Committee Chair

Michelle M.B. Osborne CFRE	University of Toronto

Committee members

Norma Cameron CFRE	Vancouver Island Health Authority
Calvin Fong	Vancouver Foundation
Rowena Griffiths CSA	Carleton University
Ruth MacKenzie	CAGP
Susan Malcolm	Aberdeen Health Foundation
Jill Nelson CFRE	The Princess Margaret Hospital Foundation
Charles O'Neil, EPC	QEII Health Sciences Centre Foundation
Maurice Prevost	University of Ottawa
Doug Puffer	Simon Fraser University
Jo-Anne Ryan PFP	TD Wealth
Ann M. Vessey	Dalhousie University
Janice Williams CFRE	BC Children's Hospital Foundation

COVER PHOTO: PEGGY'S COVE

INSIGHT
TO IMPACT
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22nd Annual CAGP
National Conference

GIVE SMART.
GIVE FROM THE HEART.
GIVE FOR IMPACT.

WHY ATTEND?

- Gain a deeper understanding of the needs of donors and beneficiaries and the innovative practical skills to satisfy them.
- Strengthen, expand and tap into the wealth of expertise within CAGP's professional network of colleagues from across the country.
- Listen and learn from leaders who will challenge, compel and convince you to adopt a more strategic charitable gift planning approach.

WHO SHOULD ATTEND?

Professionals in Charities
Development officers/managers, board members, senior staff, executive directors, fundraisers, major gift officers, finance and trust officers

Professional Advisors
Financial planners, lawyers, accountants, insurance specialists, estate planners and consultants who advise charities and Canadians

CONFERENCE SCHEDULE AT-A-GLANCE

Conference Location
Halifax Marriott Harbourfront Hotel
1919 Upper Water St.

TUESDAY

8:00 – 5:00	Gift Planning – All in a Day
8:00 – 5:00	Leaders Forum
3:00 - 6:00	Conference registration open

WEDNESDAY

7:00	Registration opens / Breakfast in Exhibit Hall
8:00 – 9:00	Opening Plenary session
9:15 – 10:45	Workshop sessions
10:45 – 11:15	Refreshment break in Exhibit Hall
11:15 – 12:15	Workshop sessions
12:30 – 2:00	Lunch and Plenary Session
2:15 – 3:15	Workshop sessions
3:15 - 5:00	Welcome Reception in the Exhibit Hall
6:30	Lobster Dinner & Kitchen Party

THURSDAY

7:00	Registration opens / Breakfast in Exhibit Hall
8:00 – 9:00	Plenary session
9:15 – 10:45	Workshop sessions
10:45 – 11:15	Refreshment break in the Exhibit Hall
11:15 – 12:15	Workshop sessions
12:30 – 2:00	CAGP AGM
2:15 – 3:15	Workshop sessions
3:15 – 3:45	Refreshment break in the Exhibit Hall
3:45 – 4:45	Workshop sessions
6:00 – 11:00	CAGP Reception and Banquet

FRIDAY

7:00	Registration opens / Breakfast in Exhibit Hall
8:00 – 9:00	Plenary session
9:15 – 10:15	Workshop sessions
10:15 – 11:00	Refreshment break in the Exhibit Hall
11:00 – 12:00	Workshop sessions
12:15 – 2:15	Lunch and Closing Plenary
2:30 – 6:30	Optional Social Activity – Peggy's Cove Tour

PLENARY SESSIONS

Wednesday April 22 8:00 a.m.

Ted's Top Ten – Key Challenges That Every Charity Leader Needs to Think About


Ted Garrard

Ted Garrard MA, President & CEO, SickKids Foundation

Charities are complex organizations that face many challenges such as competition, talent retention and recruitment, the need for innovation, and effectively engaging donors and volunteers, to name a few. Join Ted Garrard, President & CEO of SickKids Foundation as he highlights his Top 10 challenges and some of the strategies that can be used to drive success in your charity.

Sponsored By Miller Thomson lawyers | avocats

Wednesday April 22 12:30 p.m.


Myra A. Freeman

The Hon. Myra A. Freeman C.M., O.N.S., M.S.M.
Philanthropist and former Lieutenant Governor of Nova Scotia

Visit the CAGP conference website for session details.

www.cagpconference.org

Sponsored By TD

Thursday April 23 8:00 a.m.

Impactful Philanthropy


Dale Godsoe

Dale Godsoe CM, Community Leader & Retired Vice-President External, Dalhousie University

Education, the environment, women's issues, arts and culture – these are but a few of the areas where Dale Godsoe's tireless commitment to creating positive change has been felt. Dale will reflect on her life as a community volunteer leader and professional (university) fundraiser to impart her thoughts on impactful philanthropy.

Sponsored By Carters Barristers · Solicitors Trademark Agents Fasken Martineau

Thursday April 23 12:30 p.m.

CAGP Annual General Meeting


Richard Radcliffe

Who doesn't *love* an Annual General Meeting? This is your opportunity to hear from the CAGP Board about highlights of the last year, your organization's financial picture and to vote on the slate of Directors.

Feedback and questions from our committed and engaged members are always welcomed and appreciated. This year, our AGM will include a very special keynote presentation.

Special Keynote Presentation:
The State of the Planned Giving World in 2015
Richard Radcliffe, Radcliffe Consulting

Sponsored By PGgrowth

Friday April 24 8:00 a.m.

The Power of Storytelling


Terry O'Reilly

Terry O'Reilly, Co-author of "The Age of Persuasion: How Marketing Ate Our Culture"

This presentation is about the power of storytelling. The smartest, most effective marketers in the world use storytelling to persuade. We are all hard-wired to love stories, and every product and service has a compelling story to tell. This talk helps you understand how to build stories and gives you the tools to start using storytelling in your own organization.

Sponsored By Scotia Private Client Group · Anticipate®

Friday April 24 12:15 p.m.

Inside the Mind of the Bequest Donor


Russell James

Dr. Russell N. James III, J.D., Ph.D., CFP®, Professor & CH Foundation Chair in Personal Financial Planning, Director of Graduate Studies in Charitable Planning, Texas Tech University

Reporting results from his research at the Texas Tech Neuroimaging Institute, Dr. James reveals the latest insights into how donors engage in charitable bequest decision-making. These findings come together to reveal the deep processes of donor decision-making in planned giving. Not just an academic presentation, this session presents practical, effective, and tested approaches to encourage generosity among planned giving donors.

Sponsored By BMO Wealth Management
BMO Private Banking

WORKSHOP TOPIC STREAMS

Consider what you want to get out of the conference and look for sessions that deliver. Topics are colour-coded as follows:

Gift Planning Fundamentals

Certain concepts and knowledge are essential for the qualified gift planner. If you're new to gift planning, looking for a general refresher on a certain topic, or need to take your knowledge to the next level, these will fit the bill.

- Basic Tax Rules for Charitable Gifts
- So You Think You Can Listen? The Art of Truly Hearing Others
- Estate Administration for Charities
- Incorporating Insurance in Your Planned Giving Program
- Things Not to Do - or You Might Be Successful
- Planned Giving - Giving Your Program the Kick Start it Needs
- Freshen Up - Using Legacy Marketing in an Existing Planned Giving Program
- Watch Your Language
- Belief, Trust and the Local Church

Professional Skills

Arguably, any session you attend at this conference will make you a better gift planner! These sessions in particular focus on the professional skills and knowledge that take your performance to the next level.

- The Power of Gift Planning in the Midst of Death and Grief
- Lights! Camera! Action! How to Conduct an Estate Planning Seminar
- How To Create High Trust Donor Relationships
- Quiet Legacies: Planning Charitable Legacies for Millionaire Next Door Donors
- Cash is King: Top 3 Overlooked Gift Planning Strategies For Current Gifts
- New Endowments Without an 'Ask'
- Gift Planning for the Affluent
- Ethics Jeopardy
- A is for Advisor. Building an Effective Advisor Network

Managing Gift Planning

Are you the one responsible for building value in your program over the long term? These sessions and speakers address different elements of proactively managing the special challenges and opportunities of a gift planning program.

- Recruiting and Retaining Top Talent in Major and Planned Gift Fundraising
- Planned Giving - Giving Your Program the Kick Start it Needs
- Why a Planned Giving Program Should Be More Than a Bequest Program
- Score! Predictive Analytics for Planned Giving

Communications and Marketing

Finding donors, and telling them about our work – how can we do it better? All these sessions set us up with the newest and best ideas for mining for donors and reaching out across many media.

- The Philanthropic Conversation
- Using Donor Stories to Market Your Planned Giving Program
- Women and Philanthropy in Canada
- Watch Your Language
- The Art and Science of Planned Giving Surveys
- The Comprehensive Legacy Marketing Campaign
- What Do Don Draper and Legacy Giving Have in Common?

Donor Relations

The heart of our profession: engaging donors who care about the mission. Learn from experienced gift planners how to build rapport and relationships.

- So You Think You Can Listen? The Art of Truly Hearing Others
- Do You Need to Sprinkle Some Philanthropic Fairy Dust on Your Technical Knowledge?
- The 11 Questions Every Donor Asks, and the Answers All Donors Crave
- Gift Planners Are From Mars, Donors Are From Venus
- Donate with Passion or Not at All

Governance/Finance

These sessions will be of particular interest to those responsible for the good governance of a charity. While many of these sessions touch on "gift planning issues" they cover a much broader spectrum and will be of particular interest to CEO's, Finance Directors, Board members and Founders.

- Social Finance
- Government Relations – What, Why and How
- Encouraging Fundraising-Savvy Boards
- The Overhead Dilemma: In Defense of Charities

Tools & Technical Expertise

Sponsored by: **Bull Housser**

At the CAGP Conference you have the opportunity to learn from the top experts in Canadian estates law. Whether you are speaking with donors about their plans, managing a gift planning program, or in charge of all forms of fundraising and governance, these sessions will help you stay on the right side of the law.

- Powers of Attorney: Dealing with Gifts from Incapable Donors
- Pitfalls in Drafting Gift Agreements
- Primer on Wills and Trusts
- Enforcing Charitable Gifts: Working with Executors and Beneficiaries
- BC's Charitable Purposes Preservation Act, Charitable Purpose Trusts
- The Charitable Executor
- The Brave New World of Bequests: Estate Donations
- Avoiding Liability: Doing Your Legal Duty to Protect Your Bequests

Please note: *Speakers and program are subject to change.*

Education Sponsor

WORKSHOP SESSIONS

PRE-CONFERENCE SESSIONS

TUESDAY APRIL 21 8:00 – 5:00

Gift Planning – All in a Day

A full day of learning and networking that reviews Canadian trends and tax issues, common gifts in Canada and concludes with marketing, stewardship and discussing planned gifts with donors.

RoundTable / LEAVE A LEGACY™ Leaders Forum

This session is by invitation only to RoundTable Chairs and LEAVE A LEGACY™ leaders. Invitations will be forthcoming from the National Office.

Sponsored by: **SickKids Foundation**

WORKSHOP SESSIONS

WEDNESDAY APRIL 22 9:15 – 10:45

GIFT PLANNING FUNDAMENTALS

Introductory

Basic Tax Rules for Charitable Gifts

This session will provide the attendee with a basic understanding of the key tax considerations that a gift planner needs to know in order to effectively structure a gift when advising a donor. Substantive powerpoint materials, including examples where appropriate, will be included.

Theresa L.M. Man LL.B., Carters Professional Corporation

GIFT PLANNING FUNDAMENTALS

Intermediate

So You Think You Can Listen? The Art of Truly Hearing Others

Insight into audio communication cues, listening skills, and proven phone techniques will significantly increase the ability to "hear" both the immediate and less obvious meaning and emotions in difficult telephone conversations–providing practical, easy-to-apply skills that will diffuse negative interactions, enhance communication, and build authentic, trusting stakeholder relationships. The design for this workshop is a "hands-on" learning environment with large and small group interaction for a diverse, fun learning experience supported through a multi-media presentation format.

Janice R. Moro MBA, CFRE, CHRP, Artsmarketing Services Inc.

MANAGING GIFT PLANNING

Advanced

Recruiting and Retaining Top Talent in Major and Planned Gift Fundraising

Your major gift and gift planning team is crucial to the future growth of your non-profit, yet one of the major challenges faced by fundraising managers, no matter the size of the development shop, is the continued shortage of skilled and experienced fundraising professionals. How do we retain and keep our high performing major gift and planned giving fundraisers? This interactive session led by a professional recruiter and two senior managers, all specialists in the fundraising sector, will cover recommended strategies and discover other best practices amongst participants.

Deborah Legrove CFRE, crawfordconnect;
Michele Shea and Sheila Steger, University of Alberta

PROFESSIONAL SKILLS

General

The Power of Gift Planning in the Midst of Death and Grief

Four seasoned panelists will each present specific examples of donors for whom the gift planning process was a powerful tool for their grieving process. We will outline lessons learned from working with these individuals and families and the panel will address how having insight into our own comfort with death and dying enables us to meet our donor's expectations, build strong, respectful relationships and secure significant support for our organizations.

Greg Lichti CFRE and Christy Morrow CFRE,
The Princess Margaret Cancer Foundation; Laily Pirbhai,
The Calgary Foundation; Mike Strathdee MA, CFP®,
Mennonite Foundation of Canada

PROFESSIONAL SKILLS

General

Lights! Camera! Action! How to Conduct an Estate Planning Seminar Using Storytelling

Discover how to give an estate planning presentation that people will remember long after they have attended your seminar. Understand how humour and compelling images can be used effectively to move people to discussions of legacy and generous action. We will also show you how to use surveys to continually improve your presentations while sharing best practices surrounding seminar materials.

Sherri Grosz CFP, Mennonite Foundation of Canada;
Allen Schellenberg MBA, ABC District Lutheran Foundation of Canada; Quentin Schesnuik PFP, Archdiocese of Toronto

WEDNESDAY APRIL 22 11:15 – 12:15

GIFT PLANNING FUNDAMENTALS

Introductory

Estate Administration for Charities - What You Need to Know!

You've just received a notice that your charity is the beneficiary of an estate gift! What do you do now? This session will go through the basic steps of managing an estate gift, including tips on reviewing estate documents, expected timelines to be aware of and where to look for potential "red flags" and how to deal with them before they become problems. The session will also deal with ideas for stewarding these gifts and using them to help inspire other donors to consider an estate gift.

Susan McIntosh, Good Works

COMMUNICATIONS & MARKETING

Intermediate

The Philanthropic Conversation: Understanding the Financial Advisor Approach and High Net Worth Individual Perspective

Following up on important research by USD Trust and The Philanthropic Initiative in 2013, CAGP and BMO Harris Private Banking teamed up with Giv3 and Philanthropic Foundation of Canada to assess the level of potential for Canadian financial advisors to lead philanthropic discussions with their affluent clients. This session will share the findings of that research, highlighting giving behaviours, motivations and hesitations, important learnings on the philanthropic discussion and how effective it is, or isn't, and the benefits of discussing philanthropy with high net worth clients.

Ruth MacKenzie, CAGP;
Marvi Ricker M.Sc., BMO Harris Private Banking

DONOR RELATIONS

Intermediate

Do You Need to Sprinkle Some Philanthropic Fairy Dust on Your Technical Knowledge?

Philanthropic giving and planned giving have for too long been working at best side by side and at worst in silos. All fundraisers, board members and other staff need to understand that legacy giving is based on philanthropic goals. And philanthropy survives best in an organization-wide philanthropic culture. This session will highlight the important aspects of a truly philanthropic culture and how it applies to maximizing your full complement of giving programs.

Andrea McManus CFRE, The Development Group

GIFT PLANNING FUNDAMENTALS

Intermediate

Incorporating Insurance in Your Planned Giving Program

This session will review a few case studies that are designed to incorporate some easy ideas on donation of insurance into your overall fundraising program. The insurance concepts presented are designed to create immediate gifts to the charities or gifts that are fully endowed in a very short period of time while maximizing the impact that the donor will have on your organization.

Ross Young CA, CFP, Secure Capital Management Ltd.

TOOLS & TECHNICAL EXPERTISE

Advanced

Powers of Attorney: Dealing with Gifts from Incapable Donors

Charitable gifts made by donors who are incapable are vulnerable to legal challenges. This may not be the case, however, if a charitable gift is made by an attorney on behalf of a donor pursuant to an enduring power of attorney, provided that the gift is permitted by the power of attorney itself or by applicable legislation. Learn about powers of attorney and how they can be a useful tool for donors wishing to make charitable gifts during their lifetime as well as the applicable restrictions on the extent and scope of such gifts.

Kate Bake-Paterson LL.B., Davis LLP

WEDNESDAY APRIL 22 2:15 – 3:15

GIFT PLANNING FUNDAMENTALS

Introductory

Things Not to Do - or You Might Be Successful

You can't afford NOT to engage your donors or build relationships that lead to legacy gifts. The charitable impact on your charity from your middle class donor base, and not just from the high net worth individuals, can be enormous. This session will help you build donor engagement by looking at what works and what doesn't and provide tips, templates and samples from a successful gift planning program that started from scratch. Handouts will be provided.

Peter Chipman BBA, CFRE
Variety - The Children's Charity of BC

PROFESSIONAL SKILLS

Intermediate

How To Create High Trust Donor Relationships In A Low Trust World!

What is causing the deepening donor confidence crisis? In this session you will learn the three most critical factors to ensure high trust donor relationships; the five actions gift planners do that almost instantly kill trust; the three keys to intimate donor communication; and finally, the precise steps you can take in the next 90 days to establish high trust relationships with your top donors.

Keith Thomson CFP, The Donor Motivation Program

GOVERNANCE/FINANCE

Advanced

Social Finance

This session will feature a discussion of new options for social finance including a discussion of Social Impact Bonds and recent developments at the federal level that will impact the ability of charities to invest in social initiatives and/or raise capital for their projects. These new ways of doing good, impact donors and how they want to achieve their philanthropic goals. Local charities will provide examples of how social enterprise and social finance are impacting their operations and their relationships with their donors.

Susan Manwaring LL.B., Miller Thomson LLP

DONOR RELATIONS

General

The 11 Questions Every Donor Asks, and the Answers All Donors Crave

Every donor has questions before they make a gift – especially a planned gift. And when you answer these key questions, you will get more legacies. Harvey McKinnon gives us an insight into the core questions that donors want answered. His book "The 11 Questions Every Donor Asks" is used to train fundraisers around the world, in hospitals, universities, aid agencies, and every type of non-profit – and he brings these lessons to you here at CAGP! The 11 Questions approach works for both traditional and innovative channels.

Harvey McKinnon, Harvey McKinnon Associates

DONOR RELATIONS

General

Donate with Passion or Not at All

Meet two very passionate people who truly believe they can make a huge difference not only individually but through the work and people they meet each and every day. See how these Game Changers in the Financial Planning and Social Profit industry are re-creating how to build relationships, create philanthropists and drive results that make a difference in our community.

Jennifer Gillivan, IWK Foundation; Jonathan Lewis, Eastport Financial Group

THURSDAY APRIL 23 9:15 – 10:45

GIFT PLANNING FUNDAMENTALS

Introductory

Planned Giving - Giving Your Program the Kick Start it Needs

Does your planned giving program keep you up at night? Is your Board asking questions about transformational gifts? How do we kick-start our planned giving program? The answer may already be within your shop! Enhance fund development, staff knowledge and work the continuum of gifting to grow your planned giving program. The session is designed for new practitioners, small shops, or those who do not have dedicated staff.

Rosalie Courage, RBR Development Associates Ltd.

TOOLS & TECHNICAL EXPERTISE

Advanced

Primer on Wills and Trusts

Wills and trusts are common tools in the arsenal of an estate planner. This session will explore basic concepts of a trust, the requirements to create a trust, different kinds of trusts, the tax rules relating to the different types of trusts and testamentary vs inter vivos trusts and the ways in which a charity can be included in a trust structure and the consequences that may result. This seminar will be of interest to those commencing their career in gift planning as well as the seasoned gift planner looking for a refresher overview.

M. Elena Hoffstein LL.B., Fasken Martineau DuMoulin LLP

MANAGING GIFT PLANNING

General

Why a Planned Giving Program Should Be More Than a Bequest Program

At many institutions the planned giving program is now focused almost entirely on securing bequests. Although bequests will always constitute the lion's share of planned gifts, Frank makes the case for a full-menu program where various giving options are offered.

Frank Minton, Frank Minton Consulting, LLC

COMMUNICATIONS & MARKETING

General

Using Donor Stories to Market Your Planned Giving Program

Donor stories provide important social proof for marketing a planned giving program. Storytelling for legacy giving is part art and part science - and it's quite different from what triggers an immediate gift. This session will cover a dynamic case study from the University of Saskatchewan to show how donor stories can be used to grow a planned giving program.

Bev Cooper, University of Saskatchewan;
Holly Wagg CFRE, Good Works

COMMUNICATIONS & MARKETING

General

Women and Philanthropy in Canada: Results of the First Thought Leadership Report

"Time, Treasure and Talent: Canadian Women and Philanthropy" is the first in–depth review of the presence and influence of female philanthropists in Canada. As women's influence over wealth in Canada continues to rise, charities will be well served to understand women's unique approach to giving and adjust their strategies to better meet the needs and interests of their women donors. Join us as we highlight the key themes of this ground breaking report, share real-life examples, then explore what it may mean for your organization.

Jo-Anne Ryan, TD Wealth

THURSDAY APRIL 23 11:15 – 12:15

DONOR RELATIONS

Introductory

Gift Planners Are From Mars, Donors Are From Venus: How to Get Us On the Same Planet!

Do you ever feel like you are on your own planet? How do you find donors in your database who want to leave a legacy gift? And what do you say during 'the talk'? This presentation will provide you with proven strategies to start conversations that result in planned gifts. Get on the same planet as your donor and the results will be out of this world!

Samantha Laprade CFRE, Ottawa-Carleton Lifeskills

PROFESSIONAL SKILLS

Intermediate

Quiet Legacies: Planning Charitable Legacies for Millionaire Next Door Donors

The millionaire-next-door donor (MND) is an important, but hard to find and hard to understand donor. This session explores the experiences of a financial planner whose practice is built around MND donors. We will explore their motivations, "hot button" issues, and experiences in developing their legacy plans.

Ryan Fraser CFP, Quiet Legacy Planning Group Ltd.

TOOLS & TECHNICAL EXPERTISE

Intermediate

Enforcing Charitable Gifts: Working with Executors and Beneficiaries

You don't want to litigate, but sometimes an executor needs a little encouragement to fulfill a charitable gift. How do you enforce a testamentary gift when other beneficiaries are resisting the distribution? You have many legal tools at your disposal to ensure that a gift is preserved and distributed in a timely way. This session will teach you how to work effectively with executors and turn those charitable gifts into a reality.

Eric N. Hoffstein LL.B., TEP, Minden Gross LLP

TOOLS & TECHNICAL EXPERTISE

Advanced

BC's Charitable Purposes Preservation Act, Charitable Purpose Trusts

An estate creates a purpose trust of a property and the charity, which is the ultimate recipient, enters creditor protection. Which trumps? The requirement to pay creditors or the charitable purpose trust? We'll discuss the role of these trusts and how the law currently views them.

Michael Blatchford LL.B. and Margaret Mason LL.B., Bull Housser & Tupper LLP

GIFT PLANNING FUNDAMENTALS

General

Freshen Up - Using Legacy Marketing in an Existing Planned Giving Program

This session will present a newly launched multi-year Planned Giving Engagement Strategy focused on legacy marketing lead generation. It will outline steps for organizational engagement to ensure success and leverage internal resources. Results will be shared and participants will hear about practical tools and learnings they can incorporate into their own programs. This session will appeal to both new and seasoned gift planning professionals.

Sandra Dow CPCA, The Arthritis Society

THURSDAY APRIL 23 2:15 – 3:15

PROFESSIONAL SKILLS

Intermediate

Cash is King: Top 3 Overlooked Gift Planning Strategies For Current Gifts

In all fundraising offices and charities - cash is king. This session will help you integrate planned gift discussions into your major and annual programs as well as remind those above you that an investment in planned giving IS an investment in current dollars too. We will discuss both marketing strategy and talking points.

Paul Nazareth, CanadaHelps.org

TOOLS & TECHNICAL EXPERTISE

Intermediate

The Charitable Executor

When a donor to a charity is looking for someone to act as executor it is logical for him or her to reach out to the charity and ask the question: Why can't the charity be the executor of the estate? Any charity that hopes to reap the benefits of such generosity from their donors should be prepared to answer this question. This session will provide charities with the right answers to help donors choose an executor.

C. Yvonne Chenier LL.B., CFP, TEP, STI, QC, Drache Aptowitzer LLP

GOVERNANCE/FINANCE

General

Government Relations – What, Why and How

Engaging in government relations work is essential for any organization seeking to meet its mission. Join this session for a report on the CAGP Government Relations Committee's issues of focus during the last year by Committee Chair Susan Manwaring. This will be followed by a discussion lead by Grant Monck on why you and your organization need to be involved in GR and how to make your organization 'GR ready'. Material will be presented from the perspective of both smaller and larger organizations discussing how all charities can develop effective ways to engage governments at all levels.

Susan Manwaring LL.B., Miller Thomson LLP; Grant Monck LL.B., Strategic Fundraising consultant

GIFT PLANNING FUNDAMENTALS

General

Watch Your Language

The way we speak and write to prospects makes or breaks a campaign. Should we think of prospects as our grandparents? Should we be daring so they take notice or polite so they feel comforted? And what on earth do they think or know about wills and legacies? Let's debate daring and caring language.

Richard Radcliffe FInstF Cert, Radcliffe Consulting

COMMUNICATIONS & MARKETING

General

The Art and Science of Planned Giving Surveys: Discover…Prospect…Engage…Learn

Marketing surveys have been the noble servant of opinion, advice and engagement for many decades. A more recent entry into the field, planned giving surveys are proving to be a powerful tool for discovering philanthropic intent, legacy gifts, new leads and valuable feedback from donors. During this workshop you will learn how to implement your own survey strategy for planned giving. In addition, professional advisors and fundraisers who want a better understanding of their clients/prospects will come away with an actionable plan in hand.

Doug Puffer and Dee Dee Sung, Simon Fraser University

THURSDAY APRIL 23 3:45 – 4:45

PROFESSIONAL SKILLS

Intermediate

New Endowments Without an 'Ask'

From a small CA firm, endowments with a gift value in the low eight figures have been created - all exclusively from the greater than 50% of the population who either previously never had a will or had a decades old will. And nary an "Ask" was made. This session shares with participants the original planned giving research, the new tools created, and the resulting repeatable process. Participants will take home a new mind set for targeting this previous 'difficult to convert' group of potential donors.

Malcolm Fast FCA, CFP, TEP, Beyond Numbers Philanthropy Consultancy

TOOLS & TECHNICAL EXPERTISE

Intermediate

The Brave New World of Bequests: Estate Donations

In 2016 the new rules for "estate donations", announced in the 2014 Federal Budget, will take effect. These rules are and will significantly transform the way donors plan and charities administer bequests and direct designation gifts of registered funds and life insurance. This interactive session will review the new rules, outline planning opportunities and provide tips for administration.

Malcolm Burrows, Scotia Private Client Group

TOOLS & TECHNICAL EXPERTISE

Intermediate

Pitfalls in Drafting Gift Agreements

Drafting gift agreements is the basic stock and trade of a gift planner. This session will guide the gift planner through some basic questions and issues to consider when drafting a gift agreement in order to identify and avoid common pitfalls that could otherwise prejudice the integrity of the agreement. Practical examples will be provided, as well as time for interactive discussion.

Terrance S. Carter LL.B., TEP, Carters Professional Corporation

COMMUNICATIONS & MARKETING

Advanced

Philanthropic Strategies for Entrepreneurs

Philanthropy is aimed at permanent social change, at solving problems for the betterment of the world. Such lofty goals require significant personal commitment and commitment of resources. As an added bonus, strategic giving often returns benefits to the donor. In this session, Peggy will offer insights for starting meaningful conversations with entrepreneurs, guiding them through thoughtful philanthropic planning and helping them with giving decisions that ultimately enhance their own wealth plans.

Peggy Gates-Hammond CA, CFP, TEP, BMO Harris Private Banking

GIFT PLANNING FUNDAMENTALS

General

Belief, Trust and the Local Church - What Every Gift Planner Should Know About People of Faith

In 2012, Mennonite Foundation of Canada sponsored the doctoral research of a Tyndale University College and Seminary student, funding 10 donor focus groups in churches of seven Christian denominations in five provinces (Ontario and Western Canada). Participants were asked questions based on earlier research done by the Muttart Foundation. Results speak to the importance of trust, connection and shared values and vision.

Darren Pries-Klassen Bth, CFP and Mike Strathdee MA, CFP Mennonite Foundation of Canada

FRIDAY APRIL 24 9:15 – 10:15

COMMUNICATIONS & MARKETING

Intermediate

The Comprehensive Legacy Marketing Campaign – How Does Multi-channel Marketing Drive Legacy Giving?

Fundraising is undergoing an enormous change in Canada - traditional marketing approaches all have a key place in the legacy mix, but so does a dynamic digital environment, social and digital media outreach and above line mediums. How do we blend these channels to create a dynamic and engaging legacy story that makes people want to connect? Toronto General & Western Hospital Foundation is driving this conversation differently to reach more people - and creating

a successful legacy marketing program with multiple touch points. Participants will learn from their experience and come away with a road map for their own development of a comprehensive legacy campaign.

Kimberley Blease, Blakely Inc.; Anita Nielson CFRE, Toronto General & Western Hospital Foundation

TOOLS & TECHNICAL EXPERTISE

Intermediate

Avoiding Liability: Doing Your Legal Duty to Protect Your Bequests

As charities we think in terms of donors, recognition and contribution. Often times the legal obligations and duties of a charity as they relate to bequests are forgotten or lost in the excitement. Knowing your legal obligations and duties and knowing what to be aware of in advance of receiving a bequest can go a long way in ensuring your organization is protected – and can also protect your donor.

Jasmine Sweatman LL.B., Sweatman Charities Consultants

TOOLS & TECHNICAL EXPERTISE

Advanced

Cross-border Gifts of Land: Ecological Gift or Gift to a Prescribed Donee?

Americans own natural heritage properties in some of Canada's most scenic areas. Understand the options for US taxpayers who wish to protect this land. The Ecological Gifts Program will eliminate Canadian capital gains tax liability but provide no US tax benefit. Donating to an organization that is both a prescribed donee and a US 501(c)(3) charity (like American Friends of Canadian Land Trusts), can result in a US income tax benefit and capital gains tax relief.

Karen J. Cooper LL.B., LL.L., TEP, Drache Aptowitzer LLP; Sandra Tassel, American Friends of Canadian Land Trusts

PROFESSIONAL SKILLS

General

Gift Planning for the Affluent

This session will provide participants with the understanding that planned giving is a "process" focused on the needs of the donor and not the organization. We'll discuss how wealth management firms are incorporating philanthropy into their services for affluent clients through comprehensive financial plans, tax strategies for individuals and business owners, Donor-Advised Funds versus Private Foundations and the use of insurance. Participants will learn how comprehensive financial planning that includes philanthropy benefits all interested parties; how wealth management firms are increasingly facilitating their clients' philanthropy; and how to avoid unintended consequences due to lack of planning.

Ronald J. Kelly CPA, CA, Gift Funds Canada; Joyce Walsh, RBC Dominion Securities

GOVERNANCE/FINANCE

General

Encouraging Fundraising-Savvy Boards

An informed, strategic and well-trained board helps lead successful fund development ventures. Learn how you can engage your organization's board of directors and strengthen their role as champions. Mine the treasures of a highly functioning development team by ensuring your board understands how they can make a difference. Cynthia Armour, author of Charity Village's Fundraising Q & A for four years, will provide practical tips and tools for building board confidence and raising more money.

Cynthia Armour CFRE, Elderstone Resource Development

FRIDAY APRIL 24 11:00 – 12:00

MANAGING GIFT PLANNING

Intermediate

Score! Predictive Analytics for Planned Giving

Consistent giving is a characteristic of many expectancies, but your database contains many other clues about who's a good prospect. Learn how to work with your data to identify the engagement factors most closely associated with the likelihood to make a bequest, and ultimately devise a prospect ranking score to help you focus your time and resources where they're most likely to yield results.

Kevin MacDonell, Dalhousie University

PROFESSIONAL SKILLS

General

Ethics Jeopardy

Join Ligia in an energizing and fun game of Ethics Jeopardy! We are all good, honest people but ethics has a sneaky grey area that can trip up the best and brightest professionals. In this turbo-charged session, you will have the chance to brush up on the fundamentals of ethical best practices and professional standards while at the same time having a ridiculously good time. Come join us and be ready to sound your buzzer!

Ligia Pena CFRE, MOSD Foundation

PROFESSIONAL SKILLS

General

A is for Advisor. Building an Effective Advisor Network for Maximum Impact with Your Donors

We keep hearing about how important it is to network and build connections with each other as advisors and charity based professionals. It sounds so vague, doesn't it? How do you actually DO it? And is it really that useful? Peggy and Glenn will give you insight into how a carefully cultivated and nurtured network of professional advisors can impact your work with donors, and will almost certainly expand your own knowledge and skill-base, taking you and your gift planning program to the next level.

Peggy Killeen CFRE, Royal Victoria Hospital Foundation; Glenn Stewardson, CFP, FMA, Assante Capital Management Ltd.

GOVERNANCE/FINANCE

General

The Overhead Dilemma: In Defense of Charities

Pressure is increasing for charities to have low overhead. In fact it is a measure of success. And yet overhead is a critical investment to build capacity, attract and retain great people, and improve our ability to do charitable works. In this session we will examine the issue and the movements that are taking place in the US and explore ideas to defend overhead costs and promote healthy overhead levels for our industry.

Kathy Arney CA, KEA Canada

COMMUNICATIONS & MARKETING

General

What Do Don Draper of the TV Show Mad Men and Legacy Giving Have in Common?

In the 1960's, marketing genius Don Draper revolutionized the way corporations engaged consumers. The same paradigm shift that corporate marketing underwent in the 60's is transforming legacy giving today. We're seeing a profound shift away from marketing products, terminologies and techniques towards marketing emotions, values and life experiences. Find out how to re-invent your legacy program to engage donors at an emotional level.

Fraser Green, Good Works; Simon Trevelyan, S.T. Legacy Group

Speaker biographies can be found at www.cagpconference.org.

Stand Up Sessions

30-minute, quick information sessions

Legacy Giving in the Digital Age

Simon Trevelyan, S.T. Legacy Group

Looking for ways to engage your donors in legacy giving without taking up more of your limited time or resources? Share in this informal discussion on how new methods of digital engagement can help organizations with limited staff resources connect with their supporters in a sensitive and interactive way.

When: Wednesday 4:30 – 5:00 p.m.
Where: S.T. Legacy exhibit booth
Sponsored by: S.T. Legacy Group

Your Digital and Social Media Plan

Paul Nazareth, CanadaHelps.org

This free breakfast lecture will answer two questions – 1) Social media, why should I care? 2) What part of my job is digital? Paul will share practical strategies on creating dynamic profiles and managing your social media time, plus provide free resources to help you create a social media plan that will directly benefit your work.

When: Thursday April 23 7:00 a.m.
Where: Nova Scotia Ballroom corner table

DID YOU KNOW? CAGP is committed to providing conference delegates with sensational speakers. New this year, CAGP has provided an exclusive professional development opportunity for all conference workshop presenters to craft and deliver professional, meaningful and memorable presentations. We hope to make this an annual offering to enhance our conference delegate experience.

CONFERENCE SOCIAL EVENTS

Expand and strengthen your professional networks

EXHIBIT AREA – the hub of the conference! Drop by and find out how the services and products of our exhibitors can help your organization be more productive. Refreshment breaks, draws, games and other entertainment will make the exhibit area a great place to network.

LOBSTER DINNER AND KITCHEN PARTY

Wednesday April 22 6:30

A traditional lobster dinner accompanied by the Irish and Celtic sounds of the J. Murphy Band will introduce you to Maritime hospitality at its best. An alternate chicken or vegetarian dinner is available on request. Cash bar.

Price: $70 (plus HST)
Deadline to book: March 20, 2015

CAGP RECEPTION AND BANQUET

Thursday April 23 6:00

Banquet Sponsored by: Legacy Leaders

Join us in the exhibit area for a reception followed by dinner and entertainment from the Maritime Dance Performance Group as they showcase the talents of young, aspiring dancers. The Friend of CAGP Award will be presented at the end of dinner.

TOUR OF HALIFAX AND PEGGY'S COVE

Friday April 24 2:30 – 6:30 (4 hours)

Join your kilted guide who will introduce you to the delights of Halifax before leaving town for Peggy's Cove. You'll travel along the picturesque Lighthouse Route to Peggy's Cove where you will see weatherworn fishing shacks, colourful buoys and lobster traps, awe-inspiring rock formations and one of the most photographed lighthouses in the world.

Includes: Guide, return transportation (from/to hotel), 45 min city tour and 1-1.5 hours at Peggy's Cove. Dinner not included. Food available at Peggy's Cove.

Price: $42.00 (plus HST)
Deadline to book: March 20, 2015

GENERAL INFORMATION

ACCOMMODATIONS AND CONFERENCE LOCATION

Marriott Halifax Harbourfront Hotel
1919 Upper Water Street
Halifax, NS B3J 3J5
Reservations: 1-800-943-6760 / 902-421-1700

Room Rates:

Single or double room: $149 (plus applicable taxes and fees) per night. Mention the CAGP conference to receive this preferred rate or book directly through the customized web reservations page for conference rates at **www.cagpconference.org**.

Deadline to book:

After March 27, 2015 the special conference rates and rooms are not guaranteed.

Accommodation Draw

If you book by March 27th, you will be entered into a draw to win a complimentary upgrade to a Concierge Level room at the hotel.

GETTING TO THE MARRIOTT HALIFAX HARBOURFRONT HOTEL

By Car

The **Marriott Halifax Harbourfront Hotel** website provides driving directions to the hotel.

Parking

Overnight parking is $22 plus tax. Day parking is $4 per hour, plus tax, up to a maximum of $25 per day.

By Air

The Halifax International Airport (YHZ) is approximately 30 minutes from downtown. The Airport has daily direct and non-stop flights from Canada and the United States.
www.hiaa.ca

Ground Transportation from Airport

Taxi and Limousine Rates: approximately $63 CDN one-way between the airport and downtown Halifax.
www.hiaa.ca

Airport Express

The Airport Express Halifax shuttle bus service goes to various downtown Halifax hotels. Rates are approximately $22 one way ($40 return).
www.maritimebus.com

TRAVEL DISCOUNTS

porter

Travel Discount: 15% discount on available base fares (with the exception of the lowest class fare during a public seat sale).
Availability: April 18 – 28, 2015
Promo code: CAGP15
Reservations: **www.flyporter.com**

WESTJET

Travel Discount: 10% discount off the airline's best available Econo and Flex fares at the time of booking (Plus fares not included).
Availability: Discounted rates are available up to 7 days prior and 7 days after the conference dates.
Promo code: WGC12
Coupon Code: XLQ5PGA
Reservations: **www.westjet.com**

VIA Rail Canada

You can reach Halifax from Montreal by overnight train. The Halifax train station is located downtown.

Travel Discount: 10% off the best available fare in Economy, Economy Plus, Business, Business Plus, Sleeper, or Sleeper Plus class.
Availability: Discounted rates are available April 7 – May 3, 2015
Promo code: 12949
Reservations: **www.viarail.com**

BURSARY SUPPORT

Bursaries are available to cover the cost of conference registration. A bursary application form and guidelines are on the CAGP website at **www.cagp-acpdp.org**. Applications must be received by January 26, 2015.

QUESTIONS?

Tel: 1-888-430-9494 / 613-232-7991 x222
Email: **conference@cagp-acpdp.org**
Website: **www.cagpconference.org**

REGISTER ONLINE AT: www.cagpconference.org

CONFERENCE TWITTER TEAM

Join the CAGP volunteer tweeters as they share their knowledge and connections via Twitter #CAGP15

FOLLOW US

REGISTRATION INFORMATION

To register, complete the registration and session sign-up forms or visit our secure registration site at www.cagpconference.org.

CONFERENCE REGISTRATION FEES Note: HST is not included in fees	Early Bird (Until Feb 27, 2015)	Regular (After Feb 27, 2015)
Full Conference Fees		
Member*:	$775	$875
Non-member:	$1024	$1137

**In order to benefit from the "member rate", you need to be a member in good standing at the time of the conference.*

One Day Fees		
Wednesday	$350	$450
Thursday*	$350	$450

**Thursday evening banquet ticket not included*

Extra Thursday banquet ticket*:	$92	$92

*(*one Thursday banquet ticket is included in the full conference registration fee)*

Gift Planning-All in a Day		
Pre-conference - April 21 | 8:00 AM – 5:00 PM		
Member:	$315	$315
Non-member:	$350	$350

Optional Social Activity – booking deadline March 20	
Lobster Dinner April 22 | 6:30	$70.00
Tour to Peggy's Cove April 24 | 2:30 – 6:30	$42.00

Full Conference registration includes:

- all plenary and workshop sessions
- continental breakfast and lunch Wednesday, Thursday and Friday
- Wednesday Opening Reception; CAGP Banquet Thursday
- pre- and post-conference web access to all PowerPoint presentations (as released for inclusion)

Payment

Please make your cheque payable to CAGP Halifax 2015. Payment may also be made by Visa or Mastercard®. HST is not included in fees.

Cancellation and Refund Policy

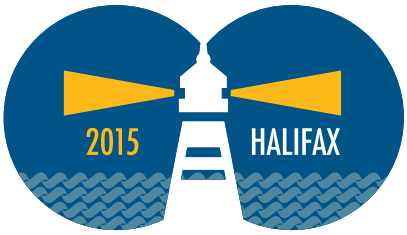
Notice of all cancellations must be received in writing. Before March 27 2015, if you must cancel your registration, three options are available:

1) Your registration may be transferred to a colleague within your organization;
2) Your registration may be carried forward for you to attend the 2016 conference;
3) Your fees may be refunded (less a $200.00 Administration Fee)

There will be no refunds, carry-forwards, or transfers of cancelled registrations after March 27 2015. No-shows forfeit the full registration fee.

Register online at: www.cagpconference.org

WORKSHOP SESSION SIGN-UP FORM



INSIGHT TO IMPACT

APRIL 22-24

22nd Annual CAGP National Conference

Please indicate your first (1) and second (2) choice of session per timeslot, as space is limited.

First Name

Last Name

( )
Telephone

E-mail

WEDNESDAY APRIL 22 9:15 - 10:45

- ☐ Basic Tax Rules for Charitable Gifts (Introductory) W1.1
- ☐ So You Think You Can Listen? (Intermediate) W1.2
- ☐ Recruiting and Retaining Top Talent (Advanced) W1.3
- ☐ The Power of Gift Planning in the Midst of Death & Grief (General) W1.4
- ☐ How to Conduct an Estate Planning Seminar (General) W1.5

WEDNESDAY APRIL 22 11:15 - 12:15

- ☐ Estate Administration for Charities (Introductory) W2.1
- ☐ The Philanthropic Conversation (Intermediate) W2.2
- ☐ Philanthropic Fairy Dust on Your Technical Knowledge (Intermediate) W2.3
- ☐ Incorporating Insurance in Your Planned Giving Program (Intermediate) W2.4
- ☐ Powers of Attorney (Advanced) W2.5

WEDNESDAY APRIL 22 2:15 - 3:15

- ☐ Things Not to Do – Or You Might Be Successful (Introductory) W3.1
- ☐ How to Create High Trust Donor Relationships (Intermediate) W3.2
- ☐ Social Finance (Advanced) W3.3
- ☐ Questions Every Donor Asks (General) W3.4
- ☐ Donate with Passion or Not At All (General) W3.5

THURSDAY APRIL 23 9:15 - 10:45

- ☐ Giving Your Program the Kick Start it Needs (Introductory) W4.1
- ☐ Primer on Wills and Trusts (Advanced) W4.2
- ☐ Why a Planned Giving Program Should Be More Than Bequests (General) W4.3
- ☐ Using Donor Stories to Market Your Program (General) W4.4
- ☐ Women & Philanthropy in Canada (General) W4.5

THURSDAY APRIL 23 11:15 - 12:15

- ☐ Gift Planners Are From Mars, Donors From Venus (Introductory) W5.1
- ☐ Quiet Legacies (Intermediate) W5.2
- ☐ Enforcing Charitable Gifts (Intermediate) W5.3
- ☐ BC's Charitable Purposes Preservation Act (Advanced) W5.4
- ☐ Using Legacy Marketing in an Exisiting Program (General) W5.5

THURSDAY APRIL 23 2:15 - 3:15

- ☐ Cash is King (Intermediate) W6.1
- ☐ The Charitable Executor (Intermediate) W6.2
- ☐ Government Relations-What, Why and How (General) W6.3
- ☐ Watch Your Language (General) W6.4
- ☐ The Art & Science of Planned Giving Surveys (General) W6.5

THURSDAY APRIL 23 3:45 - 4:45

- ☐ New Endowments Without an "Ask" (Intermediate) W7.1
- ☐ The Brave New World of Bequests (Intermediate) W7.2
- ☐ Pitfalls in Drafting Gift Agreements (Intermediate) W7.3
- ☐ Philanthropic Strategies for Entrepreneurs (Advanced) W7.4
- ☐ Belief, Trust & The Local Church (General) W7.5

FRIDAY APRIL 24 9:15 - 10:15

- ☐ The Comprehensive Legacy Marketing Campaign (Intermediate) W8.1
- ☐ Avoiding Liability (Intermediate) W8.2
- ☐ Cross-border Gifts of Land (Advanced) W8.3
- ☐ Gift Planning for the Affluent (General) W8.4
- ☐ Encouraging Fundraising-Savvy Boards (General) W8.5

FRIDAY APRIL 24 11:00 - 12:00

- ☐ Score! Predictive Analytics (Intermediate) W9.1
- ☐ Ethics Jeopardy (General) W9.2
- ☐ A is for Advisor (General) W9.3
- ☐ The Overhead Dilemma (General) W9.4
- ☐ Don Draper & Legacy Giving (General) W9.5

Please return this form to the CAGP National office:
1188 Wellington Street West, Suite 201
Ottawa, ON K1Y 2Z5
Fax: 613-232-7286
E-mail: **conference@cagp-acpdp.org**

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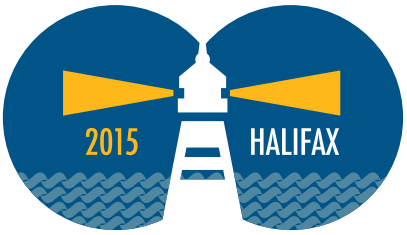
CONFERENCE REGISTRATION FORM



INSIGHT
TO IMPACT
APRIL 22-24
22nd Annual CAGP
National Conference

To register on-line go to: www.cagpconference.org

To register by mail or fax, please complete this form and the workshop session sign-up form and send together with payment to:

CAGP Conference
1188 Wellington Street W., Suite 201 Ottawa, ON K1Y 2Z5
Fax: (613) 232-7286

DELEGATE INFORMATION

First Name | Last Name | Designation(s)

Job Title | Organization

Address

City | Prov | Postal Code

( ) Telephone | E-mail

Special dietary or accessibility requests

For all allergies we cannot guarantee that no cross contamination has taken place in the special preparation of an allergy free alternate meal.

EMERGENCY CONTACT INFORMATION

Contact Name

( ) Day Phone | ( ) Night Phone

- ☐ I have my CFRE
- ☐ This is my first CAGP Conference
- ☐ I would like to volunteer at the conference
- ☐ I grant permission to CAGP to publish my contact information, as listed above, in the conference delegate list made available to attendees, sponsors and exhibitors. You may receive promotional information from our sponsors and/or exhibitors.
- ☐ I would like to receive the CAGP eNews and other electronic communications

Tel: (613) 232-7991 or (888) 430-9494 x 222 Fax: (613) 232-7286
E-mail: conference@cagp-acpdp.org **www.cagpconference.org**

CONFERENCE REGISTRATION FORM

CONFERENCE REGISTRATION FEES

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Thursday*	$350	$450	$

Thursday banquet ticket not included

Gift Planning-All in a Day *(Pre-conference - April 21, 8:00-5:00)*			
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Optional Social Activity – booking deadline March 20

Lobster Dinner *(Wednesday April 22 6:30)*	tkts x $70.00	$
Peggy's Cove Tour *(Friday April 24 2:30)*	tkts x $42.00	$
Extra Thursday banquet ticket*:	tkts x $92	$

One Thursday banquet ticket is included in the full conference registration fee

Subtotal Conference Fees	$	A
15% HST	$	B
Registration number: 870678299RT0001		
Processing Fee	$ 5.00	C
Total Conference Fees (Total A, B, C)	$	

PAYMENT OPTIONS

☐ VISA ☐ MasterCard® ☐ Cheque (payable to CAGP Halifax 2015)

Credit Card number

Expiry date

Name on card

☐ I authorize payment for total conference and activity fees by credit card

Cardholder Signature

Cancellation and Refund Policy
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E-mail: conference@cagp-acpdp.org **www.cagpconference.org**

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Director, Canada
Donor Motivation Program
15 York Street, Second Floor
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Since 1995, we have used our skills to listen to our nonprofits and their donors and taken what we've heard to build and perfect a proactive planned giving system that is the bridge between organizations and their donors.

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We Motivate Planned Giving!

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