MONTRÉAL 2019

Créativité.Collaboration.Connexion.

26e Congrès national de l'ACPDP sur la philanthropie stratégique | 26th CAGP National Conference on Strategic Philanthropy

Education Sessions

Education Sponsor:

THE DONOR MOTIVATION PROGRAM®

We Motivate Planned Giving!

Tuesday April 9 | Mardi 9 avril

Pre-conference Sessions | Cours pre-congrès

7:30 – 5:00 | 7 h 30 – 17 h

Gift Planning Fundamentals

EN

Whether you are new to gift planning or you are in need of a solid refresher, *Gift Planning Fundamentals* is a one day introductory course that reviews Canadian trends and tax issues, common gifts in Canada and concludes with marketing, stewardship and discussing planned gifts with donors.

Paul Nazareth, CAGP and Charles L. O'Neil, EPC, QEII Health Sciences Centre Foundation

A Primer on Charitable Bequest Administration

EN

In this full day course, you will be guided through the legal and practical realities of accepting gifts from estates, protecting their interests and making it work in your busy charity. Look forward to lively discussion as we work on real cases and provide tips, and protocols for you to take back to whip your bequest management program into shape. Whether your responsibilities lie in gift planning, finance, governance or legal, you will benefit from this intensive day with experienced practitioners. Note: There will be reference made to both civil and common law.

Jasmine Sweatman, Sweatman Law and Jill Nelson, The Princess Margaret Cancer Foundation

Wednesday April 10 | Mercredi 10 avril
7:00 – 7:45 | 7 h – 7 h 45

SESSION 1
Wednesday April 10 | Mercredi 10 avril
9:15 - 10:45 | 9 h 15 – 10 h 45

1.1 Accompagner le donateur dans sa démarche de planification philanthropique: un travail d'équipe et de collaboration
FR
Établissement de relations
Général
Commandité par : Fondation CHU Sainte-Justine
Une planification optimale du don, souvent en collaboration avec le notaire ou conseiller financier du donateur, conduit à l'aboutissement d'une démarche philanthropique réussie et très satisfaisante à la fois pour le donateur et l'organisme. En développant une relation étroite avec le donateur, on s'assure du respect intégral de ses volontés philanthropiques en tenant compte de sa situation personnelle et familiale. C'est pourquoi la notion de service à la clientèle auprès des donateurs et des professionnels alliés pour faciliter tous les aspects de la demarche est essentielle à la realisation du projet philanthropique.
Nicole Brunet, M. Sc., CFA, Julie Roy et Johanne Viau, Fondation CHU Sainte-Justine

1.2 Gift Planning Overview
EN
Gift Planning Vehicles
Introductory
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 and resources to jumpstart your understanding of planned and strategic giving.
Alexis Gaiptman, CFRE, Montreal Neurological Institute and Hospital (McGill University); Paul Nazareth, CAGP

1.3 Your Legacy Love Story: Keeping Your Donors Engaged, Delighted and Committed
EN
Building Relationships
Intermediate
Sponsor: The Jewish Community Foundation of Montreal
What's a Legacy Love Story? It's a robust and awesome contact plan that will keep your legacy donors connected and inspired. Father and daughter team David and Jen

Love will help you understand the importance of a Legacy Love Story—and help you create your own! We'll share practical and tactical strategies you can use starting tomorrow, and share case studies from Canada and around the world.
David and Jen Love, Agents of Good

1.4 Incapacity, Calendar Notes and Cocktail Napkins: Gifts from Incapable Donors, and the Validity of Informal Wills
EN
Legal Issues
Intermediate
Sponsor: Spiegel Sohmer Inc.
This session covers two distinct topics; first,whether a mentally incapable donor or the donor's legal representative can give a gift to a charity, and second, what type of documents might be considered to be a valid will by the courts.
Kate Bake-Paterson, LL.B., and Roger Lee LL.B., DLA Piper (Canada) LLP; Karen Brown, LL.B. St. Paul's Foundation

1.5 Unpacking Gifts of Insurance
EN
Gift Planning Vehicles
General
Sponsor: Montreal Heart Institute Foundation
Gifts of insurance can be a powerful part of the planned giving toolkit but can be confusing for donors, charities and planners. This session will highlight the simple ways to incorporate gifts of insurance into your charitable gift planning by highlighting examples of ways that it has been used effectively and others where there have been challenges. Our panel will include advisors who will share how they have successfully engaged clients use this gift to maximize charitable giving and a charitable gift planner who will share examples of administrative challenges and where gifts were not set up or executed as well as they could have been. Together this panel will help you gain insight and confidence to start or grow your own insurance donation portfolio within your gift planning program no matter the size of your organization.
Moderator: *Brenda McEachern, LL.B., TEP, RBC Wealth Management Financial Services Inc*
Panel: *Jack Bergmans, CFP, Bequest Insurance; Joan Cosby, The Donor Motivation Program; Hélène Latreille, Foundation of Greater Montréal; Stephen Webb, CSC, Entrust Financial*

1.6 Creating Change: Getting Organizational Culture Unstuck
EN
Know Your Charity
General
Does it feel like your organization is in a rut? That the way you do things could be more effective? All organizations, and people, fall victim to the same old same old.

This workshop will look at what Abundance Canada did to evolve itself, and the lessons learned from the process. Getting unstuck is hard work but whether the need is big or small, we can all do things to help organizations evolve for the better.
Rick Braun-Janzen, CFP and Darren Pries-Klassen, CFP, Abundance Canada

SESSION 2

Wednesday April 10 | Mercredi 10 avril
11:15 - 12:15 | 11 h 15 – 12 h 15

2.1 L'Intelligence philanthropique ou l'art de connecter avec les donateurs et les professionnels

FR
Établissement de relations
Intérmediaire
Commandité par : Fondation CHU Sainte-Justine
Deux professionnelles de la philanthropie – une avocate et une experte en développement des affaires et en communication – vous présenteront une toute nouvelle approche personnalisée pour établir des relations simples, efficaces et stratégiques avec les donateurs et les professionnels.
Josée Darche, MBA, CFRE et Julia Éthier-Deschamps, Fondation de l'Institut de Cardiologie de Montréal

2.2 Donor Survey: An Inspiring, Effective and Cost-friendly Approach

EN
Marketing & Communications
Intermediate
The uOttawa "PG Guys", Claude and Sylvain will share the creative process they used to implement the University of Ottawa's 2016-2017 planned giving donor survey and how their strategy achieved better results at a low cost. Learn how the global process of conceptualizing and conducting such a survey can help you identify new prospects, build stronger relationships while stewarding actual donors and provide quality data to your development, alumni and advancement divisions.
Claude Drouin and Sylvain Ladouceur, University of Ottawa

2.3 Integrated Gifting, Blended Gifts - Transformational Legacy

EN
Building Relationships
Intermediate
Sponsor: The Jewish Community Foundation of Montreal
This session will explore amplifying future generosity and strengthening donor relationships by eradicating a 'silo mentality' and creating a fluid fund development operation, with a multi-level donor relations approach. Integrated fund development operations and blended gifts are key solutions to donor engagement,

helping to set a donor's sights beyond transactional annual giving to transformational impact. To make this shift, donor engagement becomes the responsibility of the whole team, not one staff member. Now is the time to maximize each and every gift for your charity, for those you serve and for your donors through their giving lifetime.
Rosalie Courage, RBR Development Associates Ltd.

2.4 Integrated Marketing: Taking your Legacy Program to the Next Level
EN
Marketing & Communications
Intermediate
What does your average legacy donor look like? Do you know your best prospects for a legacy gift? Could you double your program in 24 months? In this session, learn how The Nature Conservancy of Canada increased the value of their legacy program by tens of millions in less than a year. Chris and Marcella will guide you through how to create a profile of a legacy donor, how to make the ask for legacy gifts by building and leveraging a multiyear integrated campaign.
Chris Carter, Candela Strategies; Marcella Zanella, Nature Conservancy of Canada

2.5 Documenting Gifts and Grants
EN
Legal Issues
Intermediate
Sponsor: Spiegel Sohmer
Documenting gifts and grants is more complex than most fundraisers and donors think. Should you use an agreement, deed or form? What terms are appropriate? Can pledges be irrevocable and may grants be returned? How are these issues addressed in Quebec, a civil law jurisdiction? This session provides a practical overview of the legal and gift planning issues relating to writing up a "good" gift.
Margaret Mason, QC and Vincent Dionne, Norton Rose Fulbright LLP

2.6 Philanthropy 3.0: Financing Solutions Instead of Funding Problems - A Social Impact Lab
EN
Building Relationships
Advanced
Sponsor: The Jewish Community Foundation of Montreal
Industry reports indicate that within six months of receiving an inheritance family members move their assets to new advisors. Focusing on the Social ROI alongside the Financial ROI client retention increases and complex social issues are addressed. Using client case studies, participants will be walked through a high-level Social Impact Lab, given tools and resources to better tap into the way that this new generation of philanthropists are investing in impactful solutions.
Richard Ouellette and Gena Rotstein, FEA, MA, Karma & Cents

SESSION 3
Wednesday April 10 | Mercredi 10 avril
2:15 - 3:15 | 14 h 15 – 15 h 15

3.1 La liquidation des successions: vos droits et obligations tant qu'héritier charitable
FR
Questions juridiques
Intérmediaire
Commandité par : Fondation CHU Sainte-Justine
Au cours de cette conférence, la conférencière mettra à profit son expérience de travail au sein d'une organisme de bienfaisance ainsi que son expertise en tant qu'avocate qui pratique dans la domaine des succession pour discuter des droits et obligations des organismes de bienfaisance qui sont désignés comme héritiers dans un testament. Elle explorera des questions telles que : Votre organisme a été nommé héritier dans un testament, connaissez-vous tous ses droits et aussi ses obligations en tant qu'héritier. La différence entre un héritier universel et un légataire particulier implique-t-elle des obligations différentes ? Connaissez-vous les risques de l'acceptation d'une succession sans le respect des règles prescrites par le droit civil et aussi par le fisc. Qui sont les créanciers qui doivent être payés en premier ? Quoi faire si la succession est insolvable, comment protéger l'organisme ? Quoi faire lorsqu'un liquidateur ne respecte pas ses obligations ? Qu'implique une quittance ? La conférencière abordera également les différents types de succession avec testament olographe, devant témoins et notarié.
Claudia Côté, LL.L, Services Juridiques Evolex Inc.

3.2 Legacy KPIs and Dashboard: How to Report Without Losing Your Mind
EN
Gift Planning Vehicles
Advanced
Reporting legacy fundraising can be a controversial topic because it cannot be evaluated like other fundraising channels. In fact, we do ourselves a disservice by looking only at current revenue. What happens to the efforts made to acquire and convert donors? Do we know what our cost ratios are? In this session, participants will learn how Greenpeace revamped its KPI definitions and implemented a legacy dashboard to better manage and track the evolution of legacy fundraising globally. The tools presented will be easily adaptable to small and large organizations.
Ligia Peña, CFRE, MInstF, Greenpeace International

3.3 Legacy Key Messages: Unlock Your Supporters' Hearts, Lock up more Gift Commitments

EN
Marketing & Communications
General
Learn how to create a powerful key message for your legacy program that can unify your legacy communications, succinctly make your case and call-to-action, improve connections with donors, move supporters to consider a legacy gift commitment, and often increase current revenue too! We'll explore ways to create a key message that integrates into various communications, then we'll work together to craft the start of an engaging and compelling legacy key message for your organization.
Aimée Lindenberger, Refocus Communications & Fundraising

3.4 Gift Acceptance Policies - Hot Policies for Hot Gifts
EN
Legal Issues
General
Sponsor: Spiegel Sohmer
This session will review how a well-developed gift acceptance policy can provide a charity and fundraiser with clarity on the type of issues to discuss with donors, assist the charity in fulfilling its fiduciary duties in accepting, receipting, and managing gifts, and help to manage donor expectations. Topics will include key issues to address and include when developing a gift acceptance policy, receipting issues, gift restrictions, gift agreements, gifts from other charities, declining and returning a gift, and special considerations and due diligence issues when accepting different types of gifts.
Terrance S. Carter, LL.B, TEP, and Theresa Man, M.Mus., LL.B., LL.M., Carters Professional Corporation

3.5 Building Relationships: Engaging Chinese Canadians in Estate Planning
EN
Building Relationships
General
Sponsor: The Jewish Community Foundation of Montreal
Legacy giving is not a popular conversation discussed openly within the Chinese Canadian culture. By delivering a comprehensive estate planning seminar in Cantonese over the past three years, The Princess Margaret provided an educational resource for this community to help start the conversation about the importance of this type of planning as well as share the impact these gifts can make in the area of philanthropy.
Franco Ng and Genane Peniak, The Princess Margaret Cancer Foundation

3.6 What We Do Together Matters: Building Successful Relationships Among Planned Giving Professionals, Donor and Advisors

EN
Building Relationships
General
Sponsor: The Jewish Community Foundation of Montreal
Do you cringe when you hear a donor say, "I have to talk to my wealth professional before committing to a planned gift"? Financial professionals can be key to unlocking not only larger gifts but deeper relationships between charities and donors. This session documents the relationship between a gift planner, financial professional and a donor and will challenge participants to cultivate relationships not only with donors but their financial professionals to better serve the needs of the donor, the charity and its constituents, and financial professionals.
Joan Cosby, The Donor Motivation Program; Lesley Mansfield, Halton Learning Foundation

SESSION 4
Wednesday April 10 | Mercredi 10 avril
3:30 - 4:30 | 15 h 30 – 16 h 30

4.1 Démystifier l'approche intégrée (Blended Gifts)
FR
Connaissance de son organisme
Intérmediaire
Commandité par : Fondation CHU Sainte-Justine
Vous avez comme défi d'accroître le nombre de donateurs majeurs ? Vous cherchez à augmenter le montant de vos dons ? Vous souhaitez maximiser votre impact auprès des donateurs ? Au cours de cet atelier, vous apprendrez comment une approche intégrée (Blended Gifts) pourrait vous aider à atteindre ces objectifs et verrez quels sont les prérequis pour réussir l'implantation de cette approche.
Jocelyne Gonthier, Consultante en dons majeurs et planifiés

4.2 Integrating Gift Planning into Your Fund Development Program
EN
Marketing & Communications
Introductory
A common complaint among fund development professionals is that planned giving is implemented off the "corner of my desk" and never gets the attention it deserves. It doesn't have to be that way! If we change the way we think and talk about it, gift planning can quickly become part of our everyday professional life – with top of mind awareness created through every fund development activity we initiate.
Leona Yez, YMCA of Northern Alberta

4.3 The "ABC's" of Trusts, Uses in Charitable Giving
EN
Legal Issues
Intermediate

Sponsor: Spiegel Sohmer
The common law trust is used in a wide variety of contexts, including charitable giving. This session will provide participants with an overview of the common law trust, including such topics as what a trust is, how a trust is created, when a trust is valid, tips for reading a trust instrument, and whether and when a charity named in a trust should issue a donation receipt. Amendments to the Income Tax Act effective in 2016 changed the rules for charitable gifting and the taxation of testamentary trusts. This session will also explore the impact of these amendments on such uses.
M. Elena Hoffstein, LL.B., and Darren G. Lund MA, J.D., Fasken Martineau DuMoulin LLP

4.4 The Millionaire-Next-Door Donor
EN
Building Relationships
General
Sponsor: The Jewish Community Foundation of Montreal
Following 5 years of interviews with millionaire-next-door donors in Southwestern Ontario, we have discovered a number of interesting facts, figures and "burning questions" specific to this group of donors. We will show you how to extrapolate our experience for use in other urban centres across Canada, and learn what "hot button" issues are forefront in the minds of these donors. In particular, we will talk about their mindset and mentality on how, and how much they plan to give.
Ryan Fraser, CFP, CIM, Quiet Legacy

4.5 Doing Good for Business – Philanthropy & the Professional Advisor's Business Practice
EN
Building Relationships
General
Sponsor: The Jewish Community Foundation of Montreal
Following up on *The Philanthropic Conversation CAGP,* in partnership with Chapters in Calgary and Vancouver, Toronto Foundation, Vancouver Foundation and Philanthropic Foundations of Canada, embarked on a new project designed to showcase the benefits of professional advisors integrating philanthropy in their practice. Thirteen "case studies" later, *Doing Good for Business: The Inclusion of Philanthropy in the Canadian Professional Advisors Business Practice* was released in 2018. This comprehensive report shares insights from an array of advisors on how philanthropy has been seminal to their professional success. Join us for this panel discussion on the project's key findings, implications and opportunities.
Moderator: *Carla Funk, Ph.D., Transform International Canada*
Panel: *Calvin Fong, Vancouver Foundation; Ruth MacKenzie, CAGP; Hilary M. Pearson, CM, Philanthropic Foundations Canada; Ross Young, CA, CFP, FEA, Secure Capital Management*

4.6 Using Research and Integration to Target Your Planned Giving Program
EN
Know Your Charity

General
This session will introduce attendees to how they can use research in their planned giving (legacy) programs. With the idea that "anyone can make a planned gift", organizations are often at a loss as to how to prioritize prospects within their legacy programs. This session will introduce attendees to: targeting legacy prospects by constituency, demographics, values, and life stage; segmenting the database; integrated giving; and researching prospect assets; among other areas.
Catherine Chalmers, United Way Greater Toronto; Tracey Church, Tracey Church & Associates; Ed Sluga, PGgrowth Inc.

Thursday April 11 | Jeudi 11 avril
7:00 – 7:45 | 7 h 00 – 7 h 45

Sponsored Education Early Bird Session
EN / Q&A in Fr & En
Sponsor: PearTree Canada
Flow Through Share Donations – What Are They & How Do They Work?
Flow Through Share Donations have become a proven philanthropic major gifting format across Canada. By working with the leading provider, PearTree Canada, your donors can lower their after-tax cost of giving – and you can raise more. PearTree has facilitated over $1 billion into the Canadian resource sector, working with donors, their legal, tax and wealth advisors and the charitable sector. Learn more and clarify misconceptions by understanding PearTree diligence and process.
Albert Labelle, PearTree Financial

SESSION 5
Thursday April 11 | Jeudi 11 avril
9:15 - 10:45 | 9 h 15 – 10 h 45

5.1 What's New & What Works in Legacy Gift Marketing in 2019
EN
MASTER CLASS
Sponsor: Global Philanthropic Inc.
(2.5 hour session)
This master class will dive deep into recent developments and best practices in bequest fundraising. Topics will cover legacy donor profiles, the size and scope of the bequest market in Canada, what messages and arguments are most persuasive at moving prospects to a gift commitment, and how digital tools are becoming a mainstay of planned gift marketing. Holly will also unveil for the first time the

findings of the 'State of the Legacy Nation 2019' poll and an innovative research project that reveals the who/what/why of visitors to charities' legacy webpages.
Charlotte Field and Holly Wagg, CFRE, MA, Good Works

5.2 Estate Administration Fundamentals in 1.5 Hours!
EN
Legal Issues
Intermediate
Sponsor: Spiegel Sohmer Inc.
This session will explain estate administration from 'the other side'. Understanding the duties and obligations an executor faces and how the charity fits into that process will help charities contribute to a smooth and enriching experience for both parties. In addition to a glossary of useful terms, we will discuss how to deal with difficult executors/lawyers, hear some general tips on executors' fees, why releases are important and why court passings aren't always a bad thing.
Colleen DeJager, PGgrowth Inc.

5.3 Legacy Marketing Prêt-à-porter
EN
Marketing & Communications
Intermediate
Would you like to boldly build or boost your bequest revenue? Attend this workshop to learn how to inspire 'ordinary' donors to make extraordinary gifts. We'll explore research that drives the leading legacy marketing programs around the world and share practical pointers you can put to work right away. Throughout the workshop you'll be creating your very own powerful legacy marketing tool you can easily complete and implement immediately upon returning to your office.
Lynne Boardman, Harvey McKinnon Associates; David Kravinchuk, The Common Good Fundraising

5.4 Money, Mindset and Wealth
EN
Building Relationships
Intermediate
Sponsor: The Jewish Community Foundation of Montreal
What does money mean to you? Money mindset (or lack of money mindset) directly influences our role as philanthropy champions. In this interactive session, we're talking about money: The good, the bad and the ugly. Together we'll dive into your money beliefs and the 7 money archetypes to uncover your natural relationship with money. Understanding our money mindset will help us be better fundraisers, better advisors and ultimately, better human beings!
Jenny Mitchell, CFRE, DMA, Chavender

5.5 The Philanthropic Discussion and Vulnerable Donors – Ethical and Legal Considerations
EN
Ethics & Judgement
General
With an aging general population and often an aging donor base, gift planners will likely face an increasing number of ethical (and sometimes legal) issues when engaging in the philanthropic discussion with potentially vulnerable donors. Through the use of case studies and discussion, this session will explore these issues, highlighting some of the practical steps that gift planners can take to help protect the charitable gifts made by such donors.
Laura West LL.B., Norton Rose Fulbright Canada LLP

5.6 Philanthropic Advisory Services and Financial Institutions: What Impact and Role Do They Play in Advancing the Work of the Charitable Sector?
EN
Building Relationships
General
Sponsor: The Jewish Community Foundation of Montreal
Financial institutions play an important role in advancing the work of the charitable sector by offering philanthropic advisory services to clients. What do these services look like and how are financial institutions engaging with clients to ensure that their philanthropic goals are achieved? Join us for an insightful discussion about the role and the impact that three of Canada's top financial institutions are having in advancing philanthropy among wealthy clients.
Moderator: *Amanda Stacey LL.B., CAGP*
Panel: *Malcolm Burrows, Scotia Wealth Management; Lydia Potocnik, LL.B, TEP, BMO Wealth Management; Jo-Anne Ryan, TD Wealth*

SESSION 6
Thursday April 11 | Jeudi 11 avril
11:15 - 12:15 | 11 h 15 – 12 h 15

MASTER CLASS
6.1 What's New & What Works in Legacy Gift Marketing in 2019
(continued)

6.2 Small Shops: Planning for Success
EN
Know Your Charity
Introductory

In a small shop you may be responsible for all types of fund raising; gift planning, major gifts, fundraising events, and more. How do you choose what to focus on for success today and in the future? This session will use real life examples of challenges and successes to provide participants with additional tools for their planned giving tool box.
Mitch Miller, Hillel Lodge Long Term Care Foundation

6.3 Nudge Theory - Influencing Giving Behaviour
EN
Know Your Charity
Intermediate
To explore how "nudging", a behavioural science concept can apply to the act of giving, Rideau Hall Foundation partnered with Behaviourial Insights Team (BIT), the MS Society of Canada and Canada's Privy Council Office (the Behavioural Insights Unit). They found two ways in which behavioural science techniques can be applied to the act of giving: by creating the intention or desire to make a gift; and by encouraging the action of actually making a gift.
Teresa Marques, CFRE, Rideau Hall Foundation

6.4 A 'Loverizing' Matrix for the Civic Cohort
EN
Building Relationships
Intermediate
Sponsor: The Jewish Community Foundation of Montreal
The term 'loverizing' comes from Tom Ahern, who in a 2015 presentation acknowledged Prof. J. Shang (Plymouth Business School) as the creator of the term. 'Loverizing' was first used to describe holistic prospect and donor centered engagement. Our loverizing matrix is a way to identify phases of gift planning as prospects advance through time and attitude. The matrix helps better identify where in the phase of giving a particular prospect sits at any time.
Bev Cooper, University of Saskatchewan

6.5 Private Foundations as a Win-Win Vehicle for the Donor and the Charitable Organization Recipient
EN
Legal Issues
Intermediate
Sponsor: Spiegel Sohmer
This workshop will look at why some donors set up private foundations, and how such a vehicle should be advantageous both for the donor and for the foundation's charity beneficiaries. The private foundation provides the donor with continuing control over an asset base ear-marked for charity. Similar to donor-advised funds, the private foundation looks for charities to benefit with grants, but in addition, the creative private foundation looks for charities with which to partner to carry out actual charitable programs.

Daniel Frajman, TEP, Spiegel Sohmer Inc.

6.6 How to Bump Up Your Lead Generation in 5 Weeks
EN
Marketing & Communications
General
From concept through planning and execution, hear all about our combined digital legacy strategy and personal follow-up from development officers. You will have a chance to hear about real conversations we initiated and the two-stage follow-up process. You'll get to hear what social media ads worked best for us; what messaging produced the highest results; what strategies we deployed for follow-up once leads were generated; and what benchmark metrics we used to define success.
Sandra Dow, CPCA and Nicole Kross, Arthritis Society

Friday April 12
7:00 – 7:45

Sponsored Education Early Bird Session
EN
Sponsored by: STEP Canada
Recent Trust and Estate Case Law Decisions
Gift planners, fundraisers, professional advisors and senior industry leaders will benefit from attending this special session by two esteemed STEP members as they provide insight on recent and important case law, including decisions on Henson trusts, multiple wills, beneficiary designations, and discretionary decisions by trustees. Decisions from both common- and civil-law jurisdictions of interest to the gift and estate planning industries will be examined through the lens of designated Trust and Estate Practitioners (TEPs). An opportunity to learn about the most important and juicy cases while enjoying your breakfast juice!
Janet Michelin, BCL, LLB, TEP, IMK SENCRL/LLP, Richard Niedermayer, LLB, TEP, Stewart McKelvey; Director at Large, STEP Canada

SESSION 7
Friday April 12 | Vendredi 12 avril
9:15 - 10:45 | 9 h 15 – 10 h 45

7.1 Donor Advised Funds: What's Ahead
EN
Gift Planning Vehicles
Intermediate
Donor-advised funds (DAFs) are not new although they are enjoying heightened visibility within the Canadian charitable sector and the wealth management industry. This important session will highlight recent in-depth research undertaken by Strategic Insight into the growth, development and medium-term outlook for DAFs in Canada. The session will review the research findings and identify issues of interest to charities, advisors and

regulators. The three presenters bring different perspectives to the session and will act as a panel for topics raised by delegates.
Katherine Dalziel, MBA, CPA, Carleton University; Karen Hudson, Strategic Insight; Keith H. Sjögren, Investor Economics

7.2 Navigating Challenging Estates
EN
Legal Issues
Advanced
Sponsor: Spiegel Sohmer Inc.
A person's estate plan may produce unexpected consequences for the beneficiaries of the estate. This session reviews common challenges faced by beneficiaries inheriting through an estate, including: (a) dealing with jointly held assets, (b) dealing with questionable actions by an attorney acting under a power of attorney, (c) dealing with private company shares in an estate, and (d) dealing with estates with limited financial assets.
Mary Hamilton, LL.B. and Ingrid Tsui, LL.B., TEP, Alexander Holburn Beaudin + Lang LLP

7.3 Setting Philanthropy to Music: Feel the Rhythm, Feel the Rhyme
EN
Building Relationships
General
Sponsor: The Jewish Community Foundation of Montreal
Anxious about finding time to build those ever important donor relationships? Take a load off Annie, it's time to unwind, crank up the volume and explore how music and philanthropy intersect. Discover how you can turn philanthropy into a beautiful symphony (or rock opera!) by building exceptional donor relationships. Two seasoned fundraisers and veteran music enthusiasts will help you stay at the forefront of the changing landscape of philanthropy through the generations as it relates to musical genres.
Deborah Barton, CFRE, KidsAbility Foundation; Vicki Hayter, Children's Health Foundation

7.4 How to Influence Change When You Are Not in Charge
EN
Know Your Charity
General
Do you feel like you are the only one who understands what it will take to create the systems, tools and culture you need for your planned giving program to succeed? This session will tackle the biggest challenges and offer tools to help overcome things like challenging colleagues, a perceived lack of resources and unrealistic expectations. This session will help you create a world in which you and your team can all thrive at work.
Kimberley MacKenzie, CFRE, KMA Incorporated

7.5 Above and Beyond: Dealing with Inappropriate Behaviour from Donors
EN
Ethics & Judgement
General
As fundraisers, we strive to build good relationships with our donors but this can sometimes place us in uncomfortable situations. Addressing inappropriate behaviour from donors is an important part of ensuring a safe working environment for ourselves and our teams. It's also an essential component of risk management for our organisations. This session aims to provide a forum for open discussion about this issue and to find ways to develop plans, tips and tools for addressing it in a timely and serious fashion.
Peggy Killeen, CFRE, CAGP Foundation; Trizana Parillo, Concordia University;
Moderator: *Julie Blais, McGill University*

7.6 Glossing over Grief – Why Fundraisers and Advisors Should Face Fears Surrounding Death Conversations
EN
Building Relationships
General
Sponsor: The Jewish Community Foundation of Montreal
This interactive workshop will provide a crash course in thanatology (the study of death and dying), unpack societal norms, offer tangible tools to help in conversations (in both your philanthropic role and everyday life), and encourage discussion and best practice sharing with peers. Together, we'll even attempt to find consensus on tricky questions like "Are giphs or social media posts ever appropriate?"
Disclaimer: This session surrounds a sensitive topic and may be difficult for attendees experiencing personal grief.
Janice L. St-Denis, CFRE, McMaster University

SESSION 8
Friday April 12 | Vendredi 12 avril
11:15 - 12:15 | 11 h 15 – 12 h 15

8.1 Big or Small, Don't Take Your Eye Off the Legacy Ball
EN
Building Relationships
Introductory
Sponsor: The Jewish Community Foundation of Montreal
No charity can afford to take their eye off the ball when it comes to expanding a legacy fundraising program. Two unique perspectives from a small shop generalist to a big shop specialist will confirm that now is the time to connect with your planned giving donors. Together we will explore ways to be proactive, creative and

examine opportunities to collaborate in order to ensure your planned giving program is built on a solid foundation.
Alexis Gaiptman, CFRE, Montreal Neurological Institute and Hospital (McGill University); Brock Warner, CFRE, War Child Canada

8.2 Painting a Picture of Our Legacy Donors
EN
Marketing & Communications
Intermediate
The goal of this session is to present and discuss important characteristics associated with donors of gifts in a will. These characteristics were identified following a quantitative and qualitative analysis of legacy prospects and donors at the Canadian Red Cross (CRC) with special focus on Quebec donors. Also, relationships between socio-demographic data and the likelihood of CRC supporters to make a charitable bequest will be analyzed and discussed with the audience.
Marnie Hill, CFRE and Natalia Kistruga, Canadian Red Cross

8.3 The Power of 'Values Aligned' Partnerships in Creating Customized Solutions for Your Clients
EN
Building Relationships
Intermediate
Sponsor: The Jewish Community Foundation of Montreal
This panel discussion will demonstrate how thoughtful, transparent, and collaborative partnerships can produce unique client-centric solutions. It will provide examples of how partners have worked together in various capacities to customize integrated capital solutions for clients that added tremendous value to the client/advisor relationship. We will emphasise the importance of providing more value in multi-generational wealth dynamics and how partnerships can set wealth management and philanthropic professionals up for success.
Moderator: *To be confirmed*
Panel: *Wendy I. Cooper, Tides Canada; Alain-Olivier Desbois SVX Québec – Esplanade; Janine Purves, CFP®, CPCA, CCS, Assante Capital Management Ltd.; Adam Spence, SVX*

8.4 Creative Solutions to Fortify Your Succession Plan: A Consideration of How to Retain and Best Utilize Young Talent From The Next Generation
EN
Know Your Charity
Intermediate
The impending retirement of senior leaders within the charitable sector means it is critical to construct a strategic succession plan that will attract, engage, and retain the next generation. But how do you do this when the average tenure is 12 to 18 months? We will break down the millennial mindset, identify the key millennial 'must-haves' and discuss top strategies to ensure the success of your organization and help you obtain your own personal career goals.

Serena Hak, The Donor Motivation Program; Natasha Smith, LL.B., Miller Thomson LLP

8.5 Using Planned Giving Tools to Build Relationships
EN
Building Relationships
Advanced
Sponsor: The Jewish Community Foundation of Montreal
Are you a donor-centered operation? Donors take care of your needs- can you take care of theirs? This session offers a number of opportunities - DAFs, investment alternatives, Special Needs Trusts and Family Philanthropy - all tools to help you get closer to your donors.
Robert A. Kleinman, FCPA, FCA, The Jewish Community Foundation of Montreal

8.6 Emerging Markets: Immigration, Ethnocultural Diversity and Languages
EN
Building Relationships
General
Sponsor: The Jewish Community Foundation of Montreal
Based on Stats Can projections in 2036: (a) together, immigrants and second-generation individuals could represent nearly 1 person in 2; (b) allophones could account for between 26.1% and 30.6% of Canada's population; (c) between 34.7% and 39.9% would be a visible minority. These various scenarios will be discussed in detail as well as strategies for bringing these groups onboard as donors.
Khalil Guliwala, MUHC Foundation