2023 Schedule

Education Sponsor

THE DONOR MOTIVATION PROGRAM®
We Motivate Planned Giving!

CFRE CERTIFIED FUND RAISING EXECUTIVE
Approved Provider for Continuing Education 2023

Full participation in CAGP's 29th National Conference on Strategic Philanthropy is applicable for up to 19 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Remember! As a CAGP member, you receive a 20% discount off of your CFRE certification or recertification!

MFA-P™: This course offers up to 9 hours credit for MFA-P™ re-certification.

The Institute for Advanced Financial Education

Some sessions are Institute accredited (1 or 1.5 CE credits).

Continuing Education Sponsor:

Advocis

Tuesday | Wednesday | Thursday | Friday

07:30
07:30 - 17:00

GIFT PLANNING FUNDAMENTALS

PRE-CONFERENCE SESSION

Are you new to gift planning and want to learn the basics? Are you an executive director or board member who is interested in starting a gift planning program at your charity but need to learn more before 'jumping in' Or, perhaps you want to add some gift planning 'tools and techniques' to support your donors in expanding and enhancing their philanthropy.

If so, this course is exactly what you need.

Whether you are new to gift planning or in need of a solid refresher, the CAGP Foundation's Gift Planning Fundamentals is a one-day introductory course that will give you the boost you need to thrive in your career.

More details

07:30
07:30 - 16:30

A LEGACY PLANNER'S ROADMAP FOR LIVING (BY FACING DEATH): A CAGP DAY OF DEATH EDUCATION

PRE-CONFERENCE SESSION

As global legacy expert Richard Radcliffe states "legacies have little to do with death and dying". The same is true of this pre-conference learning opportunity.

This day will present a unique chance for CAGP conference attendees to take a deep dive into their own understanding and comfort with death, mortality and ultimately, life. It will provide insight and the practical tools to help in both their professional life, as someone who assists donors to make legacy gifts, and as a human who will someday die. This day-long gathering will push participants outside their comfort zone in creative and thought-provoking ways, in both interactive and self-guided activities and learning sessions.

Join fellow fundraising professionals, death doulas, and death educators to focus on death and build your own personalized roadmap to a more intentional life.

More details

13:00
13:00 - 18:00

CONFERENCE REGISTRATION OPENS

17:00
17:00 - 17:45

CANADA LIFE SPONSORED SESSION: CAN LIFE INSURANCE HELP MAXIMIZE LEGACY GIFTS?

PRE-CONFERENCE SESSION

Yes, it can and it's easier than you might think!

Join our panel of financial and estate planning experts to learn how life insurance can multiply a legacy gift, growing the donation over the life of the policy. In this session, panelists will discuss opportunities for planned giving using permanent life insurance.

Canada Life has a long history of caring, 175 years, in fact.

We support charitable organizations and initiatives across the country is one of the ways our companies give back to Canadians. We engage our employees in volunteering opportunities, workplace campaigns and corporate donations so we're all connected by a shared sense of responsibility to give back and help build stronger communities.

SPEAKERS: AMY GIBBONS, MBA, CIM (MODERATOR), RYAN FRASER, CFP©, CIM, RIS, MFA-P, PAUL NAZARETH, MFA-P AND EVAN CONNELL

Tuesday | Wednesday | Thursday | Friday

07:00
0 HRS · MIN

REGISTRATION OPENS + BREAKFAST

08:00
0 HRS · MIN

PLENARY: DECOLONIZING PHILANTHROPY

Sponsored by **Miller Thomson LLP**

A theme of this talk will be, 'Let's make our grandchildren ashamed.' Ahkin will share insight on values of intentional accountability and reciprocity into philanthropy to build a future everyone can take pride in.

She will present strategies for decolonization while keeping an open heart to invite compassion, passion and (positive) philanthropy. Specifically, she will share how her own journey as an educational advocate has been empowered through the wisdom of bookworms. Once ahkin's uncomfortable, and how our planet can offer us emergent strategies to live in harmony, give openly and thrive.

SPEAKER: NIKKI SANCHEZ

09:15
0 HRS · MIN

MORNING SESSIONS A - 90 MINS

6 different sessions to choose from:

[1] MASTER CLASS: COMPREHENSIVE PLANNED GIVING PROGRAMMING – A DEEP DIVE - PART 1
Sponsored by **BC Children's Hospital Foundation**
Education level: Intermediate
Topic stream: Marketing & Communications

Take the plunge - learn how to create a compelling Planned Giving Program to reach your goals and support your mission. Marketing, communications, engagement and stewardship are all key components of success, and doing the matter-less, or with-less does not work. Partners will walk away with a comprehensive framework, and ideas for getting started or taking your program to the next level. Participants will walk away with helpful marketing tools, outreach ideas, stewardship plans and lead-generating activities that can be scaled up or down. This year's theme is "Growing Together: Making Change," but how your Planned Giving Program grows or changed over the last few years? The new generation of gifts, the planned giving donor journey is marketing, and your journey to success starts right here.

Make sure to register for PART 2 of 1115

SPEAKER: HOLLY GREATREX, CFRE

[2] PROVEN TIPS, HACKS AND TECHNIQUES TO HELP YOU EXCEED YOUR LEGACY TARGETS
Education level: Intermediate
Topic stream: Marketing & Communications

Using emerging research on human psychology and donor of death, Harvey and Kerri will share how to build a legacy marketing program that embraces how we think about death. This session will combine theory and proven studies in order to help you make better decisions about how to use your resources to engage current and future potential planned giving donors.

SPEAKERS: HARVEY MCKINNON AND KARRIN LUNDEBERG

[3] DAYS AT THE CROSSROADS: NEW DATA, NEW DIRECTIONS
Education level: Intermediate
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

This workshop will dissect the findings of a new and wide-ranging research project undertaken by KCI and the CAGP Foundation focused on the rapidly growing donor-advised fund (DAF) sector. The project which involved both primary and secondary research, examined DAFs from the perspective of the donor, the charity and the DAF sponsor. Join Kevin Cavanagh, CAGP Foundation Director and Senior Partner at Campbell Rouge together, receive over 50 slides of new information and DAF's next. The workshop will be divided evenly between a presentation of the qualitative and quantitative research findings in a Powerpoint slideshow, and an inter-active 30 & 9 session designed to encourage debate & help understand the opportunities and challenges represented by DAFs.

SPEAKERS: BOBBY KLEINMAN, FCPA, FCA, KEVIN CAVANAGH, BANNON WATERMAN, JO-ANNE RYAN, PAUL MAZARETTI, MPA & PAM KEITH, M.SOGREN

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

Advocis Track™, Sponsored by **BenefActions Foundation**
** open to all delegates, with special interest to Professional Advisors*

[4] MANUSKEWIN: A CASE STUDY IN INTEGRATING INDIGENOUS CULTURE AND PRACTICES AND TRADITIONAL FUNDRAISING PRACTICES
Education level: Intermediate
Topic stream: Building Relationships - sponsored by **PGiving®**

Wanuskewin Heritage Park is on a journey to become Saskatchewan's first UNESCO World Heritage Site. This session will explore the integration of Indigenous culture and practices into the Park's fundraising practices. With Indigenous leadership at the Board and Executive level, the Park is one of the few incredible Indigenous Women Leaders at the helm, we are on a journey to build an Nêhiyaw of Knowing Centre and Indigenous Garden. This is a fantastic development journey, and donor engagement, from the dead Indigenous to the sacred place as a place to honour, support, and raise millions to achieve its goals.

SPEAKERS: KATHY ARNEY, CA, CPA, MPA-P AND CANDACE WASACASE-LAFFERTY

[5] THE GIFT THAT IS? ACCOUNTING BEST PRACTICES WHEN ACCOUNTING FOR GIFTS
Education level: Introductory
Topic stream: Legal Issues & Ethics

Without turning any one is boring encountment, we will help you understand how Canadian accounting standards for not-for-profit organizations define different types of contributions and how they should be accounted for. We'll share examples of accounting complications we see in practice that arise from the way gifts are made, and we'll provide practical tips to help you avoid these complications. Finally, we will also clarify what we look for to verify that gifts are recorded in the appropriate period in the financial statements. Our goal: To give you just enough accounting information to ensure current policies and practices make for clear accounting for gifts within the organizations's original, strategic intentions.

SPEAKERS: WINNIFER BISNAR, CPA, CA AND DANIZEL PINTO, CPA, CA

[6] SO YOU'RE THINKING ABOUT LEADERSHIP... HOW TO MOVE UP AND WHAT TO DO WHEN YOU GET THERE
Education level: Introductory
Topic stream: Not About Gift Planning

Being a gift planner doesn't prepare you to lead people, manage a program, or create and implement strategy. Often though, career advancement only comes from moving into a leadership role with these responsibilities. In addition to actually fundraising!! Join Justin Pitre and Eli Clarke for an interactive workshop to identify career paths and the skills needed to advance, how to prepare for a leadership position, and how to succeed once you get there. We'll also address more unconventional approaches to offering leadership in your organization.

SPEAKERS: ELI CLARKE AND JUSTIN PILON

10:45
0 HRS · MIN

BREAK + EXHIBIT HALL NETWORKING LOUNGE

Exhibit Hall Networking Lounge sponsored by **KPMG Family Office**
Refreshment Break Sponsor: **Solus Trust Company Limited**

Time to refresh, network and meet exhibitors.

11:15
0 HRS · MIN

MORNING SESSIONS B - 60 MINS

6 different sessions to choose from:

[1] MASTER CLASS: COMPREHENSIVE PLANNED GIVING PROGRAMMING – A DEEP DIVE - PART 2
Sponsored by **BC Children's Hospital Foundation**
Education level: Intermediate
Topic stream: Marketing & Communications

Take the plunge - learn how to create a compelling Planned Giving Program to reach your goals and support your mission. Marketing, communications, engagement and stewardship are all key components of success, and doing the matter-less, or with-less does not work. Partners will walk away with a comprehensive framework, and ideas for getting started or taking your program to the next level. Participants will walk away with helpful marketing tools, outreach ideas, stewardship plans and lead-generating activities that can be scaled up or down. This year's theme is "Growing Together: Making Change," but how your Planned Giving Program grows or changed over the last few years? The new generation of gifts, the planned giving donor journey is marketing, and your journey to success starts right here.

SPEAKER: HOLLY GREATREX, CFRE

[2] 5% GIFT PLANNING 101
Education level: Introductory
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

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 giving, as well as some of the key terminology and basic understanding to make the most of other sessions at the conference. We'll also discuss the importance of building a team of internal and external resources to jumpstart your understanding of planned and strategic giving.

SPEAKERS: GRANT MONCK, LLB. AND BETH PROVEN, CFRE, BA, CIM

[3] 3. COMMON GROUND: GIVING IN JUDAISM, CHRISTIANITY, AND ISLAM
Education level: General
Topic stream: Building Relationships - sponsored by **PGiving®**

36% of all donations in Canada in 2019 were made by religious organizations (Canada Giving report) That translates to $37 billion out of a total of $104 billion. Something not to be ignored. This session will explore the similarities and differences in the giving practices of Judaism, Islam, and Christianity. Each of these major monotheistic religions and their diverse groups of adherents have very good lessons to share in research, resourcing and legacy conversations with individuals.

SPEAKERS: ALEN OKHOMINY, BARBARA CHAMBERS AND RONIT YAROSKY, CFRE, MA

[4] 4. CHANGES TO ESTATE DONATIONS: SEVEN YEARS LATER
Education level: Advanced
Topic stream: Legal Issues & Ethics

The 2016 'estate donations' rules fundamentally changed the most common planned gift: the bequest. Estate lawyers and executors are still getting used to the new rules, and there is still a lot of interactive session means the rules, planning tips and traps, and some of things we have learned along the way. Plus, becoming charities may be losing some of their exemptions.

SPEAKER: MALCOLM BURROWS AND JENNETT LEE, CPA

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

Advocis Track™, Sponsored by **BenefActions Foundation**
** open to all delegates, with special interest to Professional Advisors*

[5] BRINGING PHILANTHROPY BACK TO ITS ROOTS THROUGH COMMUNITY-CENTRIC FUNDRAISING
Education level: General
Topic stream: Not About Gift Planning

We're in the middle of a reset. The Community-centric Fundraising (CCF) movement is gaining traction and challenging the foundation of donor-centred fundraising that has been at the forefront for so long. But for most of the rest we: Philanthropy has always been rooted in these principles. CCF grounds fundraising in race, equity, and social justice and re-positions the donor as a partner in the work. Fundraising is no longer a one-way transaction where the donor is the only person who gets to learn, address power dynamics, and reduce the harm done. Instead, it's a two-way street that creates more meaningful, more sustainable, and more collaborative relationships, and taking exciting paths forward. This will increase your understanding of CCF, provide practical tools and resources, and help you start your journey towards equity.

SPEAKER: RICKESH LAKHANI

[6] WHAT DO ADVISORS/FUNDRAISER WISH YOU KNEW LIKE THE ANATOMY OF A COLLABORATIVE GIVING EXPERIENCE FROM A CLIENT PERSPECTIVE
Education level: General
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

In this session we will go beyond the "Advisor Breakfast". We will discuss how advisors can help with their charity partners to refine a holistic giving approach. We will examine how to maximize a client's generosity by combining different giving vehicles such as (but not limited to) insurance and donor advised funds. We will also discuss how to communicate with clients and their professional advisors. In this session will try and answer the age old question "how do charities engage with Financial Advisors in a meaningful way."

SPEAKERS: SHEENA HAK (MODERATOR), CHARLOTTE PAUL, CIM, GLENN STEWARDSON, CFP, FMA, MPA-P AND RICHARD LEFEBVRE, CFRE, MPA-P

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

Advocis Track™, Sponsored by **BenefActions Foundation**
** open to all delegates, with special interest to Professional Advisors*

12:30
0 HRS · MIN

PLENARY/LUNCH - TABLE TALKS

Sponsored by **KBF Foundation Canada**

You asked for more networking and connection and we listened! Join us for a lunch and learn, with small table discussions moderated by your CAGP peers, where you will share ideas, perspectives, news and views with like-minded colleagues on a variety of topics.

13:30
0 HRS · MIN

DESSERT BREAK + EXHIBIT HALL NETWORKING LOUNGE

Exhibit Hall Networking Lounge sponsored by **KPMG Family Office**
Dessert Break Sponsored by **Carters Professional Corporation**

Time to refresh, network and meet exhibitors.

14:15
0 HRS · MIN

AFTERNOON SESSIONS A - 60 MINS

6 different sessions to choose from:

[1] HOT TOPICS FROM CAGP'S GOVERNMENT RELATIONS COMMITTEE
Education level: General
Topic stream: Legal Issues & Ethics

CAGP's GR Committee advocates for tax measures intended to incentive and simplify charitable giving, and works to defend the charitable sector from unfavourable changes. This session will review recent changes in the disbursement quota, rules involving ecological gifts, charitable gifts of life insurance, and making recommendations on the annual federal budget. At this session, hear about what's been on the Committee's agenda, and what's coming up. Learn how you can get involved in CAGP's GR work. The Committee also wants to hear from you about government relations issues that are top-of-mind.

SPEAKERS: AMANDA STACEY (MODERATOR), TERRY CARTER AND BRAD OPPMAN

[2] A COLLABORATIVE AND PRACTICAL APPROACH: HOW WEALTH MANAGEMENT INTEGRATES PHILANTHROPIC STRUCTURES TO HELP CLIENTS WITH THEIR LEGACY PLANNING AND EXECUTION
Education level: General
Topic stream: Building Relationships - sponsored by **PGiving®**

Wealth management firms support clients not just with investment advice but in many areas of their wealth planning structure, including helping them to incorporate their philanthropic goals into their overall financial picture. Join us to learn how to work with wealth management firms to help your clients' charitable goals are realized well beyond the next generation. In this session attendees will learn about both the importance of planning around charitable gifts as well as the solutions that wealth management firms can provide to create the long-term legacy that everyone and ensure clients and their families' objectives are met.

SPEAKERS: JENNIFER BUTTON AND MIGEL FAWCETT

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

Advocis Track™, Sponsored by **BenefActions Foundation**
** open to all delegates, with special interest to Professional Advisors*

[3] WHAT FUNDRAISERS AND ADVISORS NEED TO KNOW ABOUT ESG
Education level: General
Topic stream: Not About Gift Planning

ESG, CSR, SDGs... do our people and organizations strive to make a positive difference to achieve a better world? Do we know what it is that our donors, clients and prospects are looking for when they say they want to "do good"? Left wondering what they mean, how they interpret your organizations fundraising and how to best service? Donors and clients are aligning their purpose and social impact goals with their giving and investments while companies are activating employees around their corporate sustainability. We will break down these terms, what they mean for you, your roles and organization as well as how to leverage them to meet your goals.

SPEAKER: ERIC SAARVALA, MBA, SRGS, CSR-P

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

Advocis Track™, Sponsored by **BenefActions Foundation**
** open to all delegates, with special interest to Professional Advisors*

[4] THE BIG BIG THING: WHAT SHOULD YOUR PLANNED GIVING PROGRAM LOOK LIKE IN A POST-SILO WORLD
Education level: Intermediate
Topic stream: Know your Charity

It's time to rethink and to design the way we do planned giving. Today, we are planned giving in its own silo, separate from the rest of the organization. Tomorrow, it will be so much different and so as we are, maybe we shouldn't have planned giving departments at all? Should we be structured to engaged in estate administration. Maybe major gift fundraisers should take responsibility for face-to-face conversations about legacy giving? Maybe we should be in the silo at all. Maybe our entire mission should be responsible for marketing legacy gifts to our donor base and supporting and advancing into one conversations. Kerry and Kristen have all given this topic a lot of thought. And, they've all begun this re-thinking journey and can share their own experiences. After attending this session, we don't think you'll have any more time-honored giving theories that matter.

SPEAKERS: FRASER GREEN, ROBY GREEN AND INGRID GINGRAS

[5] MARKET SEGMENTS UNIQUE TO PLANNED GIVING
Education level: Intermediate
Topic stream: Marketing & Communications

Each area of fund development has segments and metrics that provide focus and most performance. Planned giving is no different. Using a case study, this session will identify how lead generation and conversion activity create segments that form the building blocks of a planned giving program.

SPEAKER: DAVID FISHER, MBA

[6] CROSS-CHARITY COLLABORATION: THE KEY TO SUCCESSFUL ESTATE SETTLEMENT
Education level: Intermediate
Topic stream: Legal Issues & Ethics

Collaboration between charities can help settle an estate faster and in more efficient ways. Coin Charity Collaborators + Kurz Santis Estates Sector and more efficiently goals outlined with a practical demonstration of how to collaborate with other charities to settle an estate. Understanding how philanthropic organizations to demonstrate how we can reduce processing time and costs. Discuss how to last with professionalism and expertise to avoid reputational and legal risks even when, boundaries are crossed. Learn how to collaborate with other charities and professional tools and with problematic scenarios to be aware of and to challenge.

SPEAKER: VERONIQUE SALIBUR AND NATHALIE GAGNON

15:30
0 HRS · MIN

AFTERNOON SESSIONS B - 60 MINS

5 different sessions to choose from:

[1] INSIGHTS ON EXECUTORS: NAVIGATING THE OPTIONS, WORKING WITH EXECUTORS, AND SETTING UP FOR SUCCESS
Education level: Intermediate
Topic stream: Building Relationships - sponsored by **PGiving®**

Choosing the appropriate executor and knowing how to work with one can mean the difference between future estate administration success or estate administration trouble. This presentation will provide you with insights on executors, including how to choose the right one, how to work with them, and planning steps to set them for the estate administration processes, and also suggest ways that gift planners can build strong relationships to them by assisting with planning considerations and by helping executors in their new-best practices. Real life examples and practical suggestions will be included throughout.

SPEAKERS: JESSICA LO, JD, TEP AND KRISTINE LOVE

[2] FROM VISION TO IMPLEMENTATION - HELPING HNW PHILANTHROPISTS FORMALIZE THEIR CHARITABLE GIVING STRATEGY
Education level: General
Topic stream: Building Relationships - sponsored by **PGiving®**

Following the theft of a family money from business partners to philanthropists, the session will use a case study approach to showcase how to work with a client's family and advisory team to ensure a charitable giving strategy is in place to support the client's philanthropic goals. Topics discussed will include various scenarios: Discussing how to combine the wealth planning and the philanthropic planning into one cohesive client journey – it will provide best practice to integrate tax, financial planning, investment and philanthropic planning to ensure individuals and their families feel they are fully supported in achieving their charitable goals.

SPEAKERS: AILEEN BATTYE, LLB, TEP AND KIM PLEWES, MFA-P

[3] ADVANCED CHARITABLE PLANNING STRATEGIES FOR ADVISORS
Education level: Intermediate
Topic stream: Marketing & Communications

Join us to discuss how financial professionals can contribute to a stronger, charitable sector as planners and managers of their client's financial goals and interests. Vancouver-based estate planning partners Charmaine Hayes has successfully engaged wealth managers, life insurance agents, lawyers and accountants to help facilitate their clients' giving. The panel will explore how donor-advised funds and private foundations can be used as part of a comprehensive estate plan, and how to navigate the various vehicles available and gift planners or charitable organizations can work together to help their clients' wealth management.

SPEAKER: PAVAN THIND AND BOB BANCROFT

[4] AVOIDING THE COURT ROOM WITH COLLABORATION
Education level: Intermediate
Topic stream: Legal Issues & Ethics

What is really happening in the planning stages for descendants? Is the lack of planning and not engaging the right parties in the right buckets? ...and what is the role of professional advisors in the process? This session will explore what has been happening in the world of beneficiary designations and some of the recurring family situations that are leading them into the courtroom. Collaboration is the key and you will learn the approach that should be happening.

SPEAKER: JOD HERMAN, CPA, CA, CFP, CLU, TEP

[5] KNOW THYSELF: HOW YOUR MONEY CULTURE IS HOLDING YOU BACK FROM SUCCESS
Education level: Intermediate
Topic stream: Building Relationships - sponsored by **PGiving®**

What language do you bring on your professional foundation and advisor journey? Through conversation, case studies, and Profiletrend experiences, Gillian Donnell-Grant and Jenny Mitchell invite you into a different way of understanding your donors' perspectives. Gillian will share experiences in working with Profiletrend and how it has helped her clients. Jenny will bring to life a to get people talking about their money and connect the dots between how they see money, and how we can move past those assumptions about other people's money. What's the goal? To get you to ask from underneath the pile of money stories so you can serve your mission and your clients.

SPEAKER: GILLIAN DOUCET CAMPBELL, MA, CFRE AND JENNY MITCHELL, CFRE, DMA

[6] NEW RESEARCH AND THE EVOLUTION OF ESTATE GIVING IN CANADA
Education level: General
Topic stream: Marketing & Communications

Change is here. New research commissioned in 2020 by CAGP Foundation's Will Power campaign shows that estate giving in Canada has grown, the most likely bequest prospects have changed, and bequest giving is now driven by a new generation of donors. Join us to learn how these trends come together and sustain what it means for gift planning programs and engaging your donors and clients.

SPEAKER: LAURIE FOX, MBA AND PAUL MAZARETTI, MPA-P

16:30
0 HRS · MIN

WELCOME RECEPTION

Sponsored by **Good Works**

18:30
0 HRS · MIN

DINE AROUND EVENT

Sponsored by **Gentian WLG**
Join us for an optional evening to relax and meet new people.

07:00
(0:00 - 08:00)

REGISTRATION OPENS + BREAKFAST

07:00
(0:00 - 07:45)

EARLY BIRD SPONSORED SESSION: FLOW-THROUGH SHARE DONATIONS – ENABLING TRANSFORMATIONAL & ACCELERATED PHILANTHROPY

Sponsored by ***PeerTree Canada***

Learn how advisors – wealth, tax, legal and charitable advisors – from across Canada are using the PeerTree Canada Flow-Through Donation platform to assist their major gift donors/clients to efficiently and significantly increase their gifts, while lowering their after-tax cost of donation.

This session will start with a simple explanation of what flow-through shares are and how the PeerTree Canada Flow-Through Donation platform works. You will learn how to put this widely accepted major gift fundraising format into practice – from first conversations of a donor, or advisor, about a charity – and become a key component of your donor/client management strategy. Experience actual examples of success from leading institutions to grassroots organizations.

SPEAKER: MARILYN ANTHONY

08:00
(1:00 - 09:00)

PLENARY: TUGBOATS AND TANKERS: A NEW CONTEXT OF PHILANTHROPY

Sponsored by ***CIBC Private Wealth***

Vancouver Foundation has been rethinking our approach to granting in order to centre justice, equity, diversity, and inclusion in our work. In this panel discussion we will explore the ebb and flow between funders and grantees, and how we build momentum when we work together. Building on the metaphor of tugboats and tankers we will take a closer look at what it means to share and shift power – what it changes about how we work with donors, our processes as funders, and the opportunities we can help create in partnership with grantees. The metaphor works on a few levels – we promise. Join our discussion to learn more about how.

SPEAKERS: KATE HAMMER (MODERATOR), BOB MILLS, KENJI MAEDA AND KEVIN MCCORT

09:15
(1:15 - 11:45)

MORNING SESSIONS A - 90 MINS

6 different sessions to choose from:

S1. SMALL SHOPS: PLANNED GIVING A TO Z – MASTER CLASS PART 1
Sponsored by ***BC Children's Hospital Foundation***
Education level: Introductory
Topic stream: Know your Charity

Whether you're already doing planned giving off the side of your desk, or starting from scratch, this session covers the essential strategies to be successful with planned giving in a small organization. We'll cover everything from: getting budget approved by your Board, ways to reach out to supporters, choosing your best donor pools, cultivating interest over time, inspiring supporters to take action, recognition and stewardship, program success measurement, simple gift administration and more. If you're in a small shop and want maximize the transformative benefits of planned giving at your organization for years to come – this session is for you!

Make sure to register for PART 2 at 11:15

SPEAKER: AIMÉE LINDENBERGER, BTECH, CFRE

S2. MANAGING UP: GETTING YOUR BOARD AND BOSS TO SAY YES!
Education level: General
Topic stream: Not About Gift Planning

Effectively managing up is a crucial part of growing your planned giving, creating change, and achieving the impact you dream of. In this session, you'll learn practical strategies to influence decision makers at all levels of your organization – and we'll work to create a realistic action plan to help your board and boss to say YES to growing your planned giving together!

SPEAKER: DeMAA LEWZEY, CFRE

S3. 12 WAYS TO BE MORE INCLUSIVE
Education level: General
Topic stream: Not About Gift Planning

Looking for ways to be more inclusive? Join me for a discussion on 12 ways to be more inclusive in your life and work. We will discuss how to use these tools to build a more inclusive workplace. Bring your questions, concerns and let's discuss why we would like to be more inclusive. Bring your ideas and successes and tell us how your workplace has championed inclusion. Add to the list and let's make philanthropy a better industry to work in.

SPEAKER: JAYA MOOTOO

S4. JUST DO THE RIGHT THING! ETHICAL BEST PRACTICES IN LEGACY GIVING
Education level: Intermediate
Topic stream: Legal Issues & Ethics

Ethics in fundraising should always be top of mind when working with donors. As professional fundraisers we may have questions, especially when it comes to complex legacy gifts. Please join Crystal Schmalle, CFRE from Hospitals of Regina Foundation and Vicki Hayter from Children's Health Foundation to discuss this important topic.

SPEAKER: CRYSTAL SCHMALLE, CFRE and VICKI HAYTER

Institute accredited CE (15 credits)
Continuing Education Sponsor: **ADVOCIS**

Advisor Track... Sponsored by* ***BenefaCtion Foundation***
**open to all delegates, with special interest to Professional Advisors*

S5. USING FACEBOOK TO FILL YOUR LEGACY PROSPECT PIPELINE
Education level: Intermediate
Topic stream: Marketing & Communications

If you're looking to fill your legacy pipeline with brand new prospects, this session is for you. We're talking about the no-end-outs of running a legacy lead generation campaign on Facebook. We'll walk through the prospect journey together step-by-step, highlighting where you need to infrastructure, develop creative, write budgets, and measure your KPIs. Best of all, this super-practical session will be packed with real client case studies, so you can see it all in action!

SPEAKER: HOLLY WAGG, MA, CFRE

S6. "A LEGACY FOR TOMORROW: A TAX BREAK TODAY"
Education level: Advanced
Topic stream: Gift Planning Vehicles - *Sponsored by* ***Canada Life***

Do you have clients or donors who have land that contains natural habitat, such as a forest, prairie, wetland or shoreline? Or perhaps you have clients who value cultural property such as fine art or other significant objects? Through Canada's unique Ecological Gifts Program, landowners can donate their land, or a partial interest in their land, to a conservation organization, such as a land trust, and receive a tax benefit and potential charitable tax receipt. Canadian Cultural Property Export Review Board oversees a program that provides incentives for donations of cultural property to designated Canadian organizations such as galleries, museums, archives, or libraries. In addition to peace of mind, donors can receive significant income tax benefits, including elimination of any tax on the capital gain. This session will help give you the necessary tools to assist your clients or donors to make such gifts a reality.

SPEAKERS: DAVID CUNNINGTON, M.SC., MIJIN KIM AND KAREN COOPER

10:45
(2:45 - 3:15)

BREAK + EXHIBIT HALL NETWORKING LOUNGE

Exhibit Hall Networking Lounge sponsored by ***KPMG Family Office***

Time to refresh, network and meet exhibitors.

11:15
(3:15 - 12:15)

MORNING SESSIONS B - 60 MINS

6 different sessions to choose from:

S1. SMALL SHOPS: PLANNED GIVING A TO Z – MASTER CLASS PART 2
Sponsored by ***BC Children's Hospital Foundation***
Education level: Introductory
Topic stream: Know your Charity

Whether you're already doing planned giving off the side of your desk, or starting from scratch, this session covers the essential strategies to be successful with planned giving in a small organization. We'll cover everything from: getting budget approved by your Board, ways to reach out to supporters, choosing your best donor pools, cultivating interest over time, inspiring supporters to take action, recognition and stewardship, program success measurement, simple gift administration and more. If you're in a small shop and want maximize the transformative benefits of planned giving at your organization for years to come – this session is for you!

SPEAKER: AIMÉE LINDENBERGER, BTECH, CFRE

S5. CHALLENGING SITUATIONS IN GIFT RECEIPTING
Education level: Intermediate
Topic stream: Legal Issues & Ethics

This session reviews how to deal with challenging situations involved in charities' gift receipting process. Topics will include unique receipting issues for different types of gifts, specially-sought receipting scenarios, how to cancel a receipt if the gift was returned, and much more. Fundamental rules on gift receipting will be briefly reviewed, including split receipting rules, deeming of fair market value, assessment of advantage, contents of receipts, and management of receipts. Examples will be used to illustrate various scenarios.

SPEAKER: TERRANCE S. CARTER, B.A., LL.B., TEP

S7. THE PARADIGM SHIFT: INTERSECTIONAL WORLDVIEWS IN INDIGENOUS PHILANTHROPY
Education level: General
Topic stream: Building Relationships - sponsored by **PGgrowth**

Are you an allied professional or part of a settler-based organization wanting to not cause harm to the communities you serve? The way we move through philanthropy impacts those around us and there is a growing movement towards working in trust and community. Hear from three professionals working at First Peoples' Cultural Foundation and First Peoples' Cultural Council, all from different backgrounds. Learn how their unique worldviews frame the work that they do within Indigenous Philanthropy and how their intersectional perspectives impact how they work with internal and external communities.

SPEAKERS: GORDON LARIN, EMILY CABRERA AND KAREN AIRD

S8. PREDICTING LEGACY GIFTS: THE GOOD, THE LEARNINGS, AND THE RESULTS
Education level: Advanced
Topic stream: Know your Charity

With the greatest intergenerational transfer of wealth underway, forecasting legacy gift revenue is a growing challenge. Unveiling to shortcharge mission work, see charity sought-after corporate projections. Join the BC SPCA and Enormous Analytics as they walk through their legacy modelling journey – spoiler, there were a few bumps along the way! We will cover the project process, results, operationalizing, and the changes BC SPCA has seen with its legacy program. Lastly, we'll review key data points organizations should be sure to help their analysis like this one.

SPEAKERS: SHONI FIELD AND JENNIFER ROBINS, MBA

S9. MILLION DOLLAR LEGACY MARKETING – WHY YOU DON'T NEED IT AND WHAT TO DO INSTEAD
Education level: General
Topic stream: Marketing & Communications

Have you been overwhelmed by big-budget, gold-plated Legacy Marketing programs presented as best-practice examples to emulate? Sure, it may be nice to have build a successful program but for most charities, this is simply an impossible hurdle. Don't worry, you CAN build a solid Legacy Marketing program that delivers real results with no or low-budget. Join me for this session to learn the secrets to invest in a practical program for future legacy giving growth. Join this session to get on the practical growth path to build your very own 'Drop, Stop' program and get your legacy revenue stream flowing.

SPEAKERS: DAVID KRAVINCHUK AND LYNNE BOARDMAN

S6. DONATION OF PRIVATE COMPANY SHARES
Education level: Intermediate
Topic stream: Gift Planning Vehicles - *Sponsored by* ***Canada Life***

Join Florence Carey, Lawyer, F T Carey Law Corporation for an informative discussion on Donation of Private Company Shares. At their most basic, a gift of private company shares may be followed by an immediate redemption of the shares, so that the charity ends up essentially receiving a cash gift. Alternatively, the gift may be structured so the charity is anticipated to hold the shares for a short time before receiving redemption proceeds, or a longer time as a capital investment. The valuation of gifts of private company shares is The Winnipeg Foundation has highlighted the potential for transformative gifts to be made by way of private company shares. This presentation will discuss the process, the rules, and what charities need to consider as they contemplate receiving these gifts.

SPEAKERS: FLORENCE CAREY

13:30
(3:30 - 14:30)

LUNCH PLENARY: REFORMING DAFS IN CANADA

Sponsored by ***Abundance Canada***

Donor-advised funds or 'DAFs' are growing in popularity in Canada among donors, but there is an active debate about the regulation of foundations with these charitable funds. What is the role of donor tailored funds in Canada's charitable sector? And is reform needed to ensure DAFs serve both philanthropy and the needs of charities? This provocative plenary by veteran gift planner Malcolm Burrows will provide food for thought for everyone who cares about the future of Canadian philanthropy.

SPEAKER: MALCOLM BURROWS

13:30
(3:30 - 14:30)

BREAK + EXHIBIT HALL NETWORKING LOUNGE

Exhibit Hall Networking Lounge sponsored by ***KPMG Family Office***

Last chance to network and meet with the exhibitors!

14:30
(4:30 - 15:30)

AFTERNOON SESSIONS A - 60 MINS

6 different sessions to choose from:

7). PHILANTHROPY AND THE FAMILY ENTERPRISE: UNDERSTANDING WHY AND HOW BUSINESS OWNERS CREATE LASTING IMPACT THROUGH VALUES AND LEGACY
Education level: Intermediate
Topic stream: Building Relationships - sponsored by **PGgrowth**

Family businesses are a major driver in the Canadian economy. Many family owned businesses also approach philanthropy as a family effort. As the family business evolves into a family enterprise, philanthropy takes on new meaning and purpose. The long term vision of most family-owned businesses is to create value and wealth for their descendants and for society as a whole. This session will leave you with a better understanding of what a family enterprise is, how they approach philanthropy and how best to engage with this segment to grow your donor base.

SPEAKERS: LYDIA POTOCNIK, LLB, TEP, FEA AND SHELLEY FORSYTHE

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

Advisor Track... Sponsored by* ***BenefaCtion Foundation***
**open to all delegates, with special interest to Professional Advisors*

7.5. PLANNED GIVING IN THE 21ST CENTURY – THE ROLE OF CULTURAL SENSITIVITY IN MULTICULTURAL ENCOUNTERS, IN CONTEXT
Education level: General
Topic stream: Building Relationships - sponsored by **PGgrowth**

Our session will focus on cultural sensitivity of gift planning in a multicultural society. The stories of multicultural encounters experienced by the presenters will be placed on the background of ethnically and culturally diverse historical influences that resulted in today's observed diversity. Issues of cultural sensitivity in our encounters with potential donors coming from different backgrounds can open many doors which would stay shut otherwise, this session will help participants be respectful and we, as a diverse trio of speakers, will amplify the message of inclusivity and cultural sensitivity.

SPEAKERS: PETER OKONSKI, CFRE, RHONDA SOGREN AND HENRIETTA LAM, CFRE

7.3. ENDOWMENT AGREEMENTS IN 2023
Education level: Advanced
Topic stream: Legal Issues & Ethics

Properly constructed funding agreements are an essential tool for charities and foundations to assure that donor intentions are carried out, expectations are met, and resource challenges are minimized. Poorly drafted agreements are confusing, costly, and can squander opportunities to maximize the impact of charitable gifts. What should fund agreements look like in 2023? This presentation will look at key elements that should be in every agreement, how fund agreements can be made more user-friendly for both donors and charities, as well as tips and traps learned over years of working with charities, foundations and donors.

SPEAKER: ANDREW VALENTINE AND GWENYTH STADIG

7.4. SMALL OR LARGE SHOPS: THE IMPACT OF MENTORSHIP PROGRAMS TO ELEVATE YOUR TEAM'S SUCCESS!
Education level: General
Topic stream: Not About Gift Planning

For years, the professional philanthropic industry has focused on networking and left no room for mentorship. With so many small shops and specialized positions in charge of fundraising, it has become a necessary piece of the professional toolkit, especially when onboarding is a time challenge for many organizations. Join us to learn how to create a mentorship program to maximize connection. It is a major piece of professional wellness in the world of fundraising. This 60-minute session will provide actionable ideas that both employees and managers can put into practice in short order and achieve 'hell' results.

SPEAKER: SHERRY SCHAEFER, BA, MHA

7.5. CONNECTING WITH THE NEXT GENERATION OF DONORS
Education level: General
Topic stream: Building Relationships - sponsored by **PGgrowth**

The Winnipeg Foundation is committed to learning and to doing better, it recognizes that diversity, equity inclusion and belonging (DEIB), like truth and reconciliation, is a journey – one that requires urgency. We are committed to building a Winnipeg where everyone can fully flourishes for all. Part of The Foundation's Kor-Ah strategy includes ensuring that individuals of all backgrounds and identities feel welcome to work with The Foundation as donors and other stakeholders. Join this a presentation and conversation about The Foundation's efforts to develop and implement the Kor-Ah strategic across philanthropic structures in the organization.

SPEAKER: MICHELLE GAZZE

7.6. LAND, LOTS OF LAND! OPTIONS ON HOW TO SECURE GIFTS OF LAND AND REAL PROPERTY TO MOVE FORWARD YOUR CHARITY'S MISSION.
Education level: Intermediate
Topic stream: Gift Planning Vehicles - *Sponsored by* ***Canada Life***

Gift Planning to a large extent is a discussion of gifts of assets. One of the most common and valuable assets Canadians hold is their primary residence, recreational property and land for agricultural use. Specific topics to be covered are ways to gift land, a case study on residual interest gifts of land and application to your organization's gift acceptance policy. The role of a gift planner with prospective donors, your board and staff will also be outlined to ensure that your organization is ready to receive these lucrative gifts and the transformational opportunity that they represent.

SPEAKERS: GRANT MONCK, LL.B. AND MICHELLE JOHNSON, CFRE

18:00
(7:00 - 9:00)

BANQUET RECEPTION

Time to celebrate!

Sponsored by ***BC Children's Hospital Foundation***

19:00
(7:00 - 12:00)

BANQUET DINNER & 2023 FRIEND OF CAGP AWARD PRESENTATION

Banquet Sponsor: ***Donor Compass***
Friend of CAGP Award Presenting Sponsor: ***CI Assante Private Client***
Banquet Entertainment Sponsor: ***Private Giving Foundation, Available through TD***

07:00
07:00 - 08:00

REGISTRATION OPENS + BREAKFAST

07:00
07:00 - 07:45

EARLY BIRD SPONSORED SESSION: THE CURRENT STATE OF CANADIANS AND THE IMPLICATIONS ON LEGACY GIVING

Sponsored by ***Environics***

The demographics of Canada have changed dramatically over the past several decades. With the release of the 2021 Census, this session will dive into the current demographics of Canada. In addition to demographics, with the rise in inflation and interest rates, cooling real estate prices, and a volatile stock market, we will also review the state of Canadian finances - where are people really at? Pulling these macro trends together, we will discuss these changes through the lens of legacy giving.

SPEAKERS: ALLEN DAVIDOV, MBA, CM AND JENNIFER ROBINS, MBA

08:00
08:00 - 09:00

PLENARY: SELF-DETERMINATION: A PHILANTHROPIC HOME FOR BLACK COMMUNITIES

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

Key findings from the Unfunded: How Black Communities are Overlooked by Canadian Philanthropy suggest that both private and public foundations severely underfund Black-serving and Black-led community organizations, and that this systemic underinvestment is due to a lack of relationships with, and representation of, Black communities in philanthropy.

The Foundation for Black Communities was established to help ensure that every Black person in Canada can thrive and all Black communities have agency in defining their own future. But the struggle for self-determination for racialized communities can't happen in isolation. It involves shifting from a scarcity to abundance mindset, fostering relationships, removing barriers, learning from different cultural understandings of philanthropy, and truly practicing trust-based philanthropy.

Philanthropic organizations need to actively work to shift their perception of racialized communities as purely recipients of charity to active contributors, knowledge keepers and philanthropists.

SPEAKER: DJAKA BLAIS

09:15
09:15 - 10:45

MORNING SESSIONS A - 90 MINS

6 different sessions to choose from:

8.1. MASTER CLASS: FAITH & FUNDRAISING - THREE TRADITIONS, UNLIMITED QUESTIONS - PART 1

Sponsored by ***BC Children's Hospital Foundation***
Education level: General
Topic stream: Building Relationships - sponsored by **PGgrowth**

A trio of Jewish, Muslim and Christian fundraisers explain what you need to know about religious donors. Bring your questions, there are no dumb ones! A safe space to talk about faith and money is a gift we offer to the fundraising community.

Make sure to register for PART 2 at 11:15

SPEAKERS: ANN ROSENFIELD, MBA, CFRE, IMAM IRSHAD OSMAN, CFRE AND DR. LORI GUENTHER REESOR

8.2. WHEN DONORS DIE

Education level: General
Topic stream: Building Relationships - sponsored by **PGgrowth**

The sad reality of working with legacy gifts is that to receive these gifts, the donors die. When this happens, how do you know what to do? It can be challenging to decide how to show you care while maintaining your professionalism. At the same time, the death of a donor can be deeply upsetting for you and your colleagues. Samantha Barr, a fundraiser early in her career, has assembled a panel of experts and invites attendees to share in this conversation about how to manage when donors die.

SPEAKERS: SAMANTHA BARR, JANICE ST-DENIS, JAYA MOOTOO AND MAYA AHMAD

8.3. DONOR ADVISED FUNDS - LIFE AND DEATH

Education level: Intermediate
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

You have all heard of Donor Advised Funds, but do you understand the legal implications of creating a DAF and how it can be incorporated into a donor's planned giving? We will work through a DAF case study following the life and death of a donor, beginning with a donor wanting to establish a DAF as a planned giving vehicle through to her death (and beyond). We will discuss issues such as what a DAF is, at law, the implications of creating a DAF both for donors and charities, charitable giving through DAFs, and current public policy issues surrounding DAFs.

SPEAKERS: KATE BAKE-PATERSON, BA, LLB AND CALVIN FONG

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

Advisor Track - Sponsored by* ***BenefAction Foundation***
** open to all delegates, with special interest to Professional Advisors*

8.4. RING RING! USING THE PHONE FOR LEGACY GIVING CONVERSATIONS

Education level: Intermediate
Topic stream: Marketing & Communications

In this real-life case study, Simon Fraser University will present on their work using the annual giving call center to have discover calls with planned giving donors and potential donors. What we discovered was a low-cost, high-impact method of engaging and qualifying donors and prospects. We will get right into the weeds and share openly and honestly what we learned, what worked well (and what didn't!) and what we think you can take to your own organization.

SPEAKERS: RORY GREEN AND BARKHA PATEL

8.5. HOW TO ADAPT TO DONOR NEEDS

Education level: Intermediate
Topic stream: Building Relationships - sponsored by **PGgrowth**

Building meaningful relationships with donors is at the core of our work. We also know not every donor responds to the same style of communication, in the same way. The Winnipeg Foundation team has used DiSC, a respected model that helps identify different behaviour and styles, to identify the behaviours of their donors so Donor Managers can adapt their personal styles and communication tools to better meet the needs of their donors. In this session, you will learn your DiSC type, review others, and learn tools that work effectively with each personality style to better improve engagement and stewardship results.

SPEAKERS: PATRICK O'REILLY, CEC, PCC AND MARY BETH TAYLOR

8.6. EQUITABLE SURVEYS FOR FUNDRAISING

Education level: General
Topic stream: Not About Gift Planning Building Relationships - sponsored by **PGgrowth**

A single survey is the most powerful tool a nonprofit can leverage to reach out to its past, present, and future supporters if designed and structured thoughtfully. Through such a survey, rich data could be collected for potential opportunities for future engagement. So, join me in this session to rethink the design and analysis of a donor and volunteer engagement survey. This session will include those basics followed by a case study on applying those basics.

SPEAKER: MEENA DAS

10:45
10:45 - 11:15

BREAK

Time to refresh and network

11:15
11:15 - 12:15

MORNING SESSIONS B - 60 MINS

6 different sessions to choose from:

9.1. MASTER CLASS: FAITH & FUNDRAISING - THREE TRADITIONS, UNLIMITED QUESTIONS - PART 2

Sponsored by ***BC Children's Hospital Foundation***
Education level: General
Topic stream: Building Relationships - sponsored by **PGgrowth**

A trio of Jewish, Muslim and Christian fundraisers explain what you need to know about religious donors. Bring your questions, there are no dumb ones! A safe space to talk about faith and money is a gift we offer to the fundraising community.

SPEAKERS: ANN ROSENFIELD, MBA, CFRE, IMAM IRSHAD OSMAN, CFRE AND DR. LORI GUENTHER REESOR

9.2. A COMPELLING CASE STUDY: THE TALE OF A GIFT THAT DID NOT HAPPEN

Education level: Advanced
Topic stream: Legal Issues & Ethics

The donor wanted to make a gift and a deadline was looming. Could the charity clear legal and internal policy hurdles in time to make a generous gift of private company shares work? Come hear how the charity worked together with their lawyers, the donor's financial planner, and a donor advised fund foundation to try to make this gift happen. What went wrong? Hear about the legal issues, working together and deciding when to walk away. Would we do anything differently next time? And Is this donation over, or do we have a happy ending after all?

SPEAKERS: KATE LAZIER, LL.B. CFP, SUSAN MANWARING, L.L.B., TEP, NICOLA ELKINS TEP, CFRE, MFA-P AND JILL NELSON, CFRE, MFA-P

9.3. NEVER DOUBT WHAT SMALL CAN DO: A JOURNEY TOWARDS POWER THE POSSIBLE

Education level: General
Topic stream: Know your Charity

It's a calling to build out what tomorrow can be, if we have the courage to envision our potential. How BC Children's Hospital Foundation began unlocking the potential of our people by establishing a culture that's driven by purpose, instills pride and creates an environment where people can do their best work.

SPEAKERS: MALCOLM BERRY AND SURINA SPROUL

9.4. LOOKING AFTER LEGACIES

Education level: Introductory
Topic stream: Legal Issues & Ethics

As donors become savvier in their ways of giving, charities are learning how to administer complex gift structures. At the same time, as fundraisers we are increasingly taking a donor-centred approach, this can potentially lead to gifts with a narrower focus and greater restrictions. Both of these trends offer a positive donor experience but can lead to gifts that are more challenging to administer for the charity. Honouring donor intentions is an essential component of our ethical duty as gift planners and estate gift administrators. Occasionally, as gift administrators, we may find ourselves at a crossroads navigating the competing needs of the charity and the estate trustees while ensuring the donor's legacy intentions are fulfilled. Finding the way forward isn't always obvious.

SPEAKERS: CHRISTINA PARFITT, CFP AND CARMEN VANDERLINDE

9.5. CHARITABLE GIVING STRATEGIES FOR HIGH NET WORTH DONORS

Education level: Advanced
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

Learn about charitable donation strategies used by high-net-worth donors and philanthropists so you can have an informed conversation with their advisors and demonstrate your familiarity with the problems and solutions available for high-net-worth donors.

SPEAKER: TINA TEHRANCHIAN, CFP, CLU, CHFC, CIM, MFA-P

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

Advisor Track - Sponsored by* ***BenefAction Foundation***
** open to all delegates, with special interest to Professional Advisors*

9.6. GETTING THE JOB OFFER THAT FEELS GREAT!

Education level: General
Topic stream: Not About Gift Planning

What are your salary expectations? The dreaded question! It shouldn't be. With the ongoing efforts to ensure equity, transparency, and diversity in the nonprofit sector you shouldn't feel like you're buying a car and fighting for the best deal when negotiating your compensation. However, some organizations are still improving their systems when it comes to transparent compensation and employees want to ensure the offer they accept feels great. In this session we will discuss strategies for researching organizations that commit to equality, equity, transparency, and diversity in the workplace, how to ask for all the information needed for you to make a decision and how to prepare and position yourself to get the compensation and benefits you want.

SPEAKER: PHIL GERARD, MBA

12:30
12:30 - 14:00

CLOSING PLENARY: JOY AND JUSTICE: FUNDRAISING'S NECESSARY EVOLUTION

Sponsored by ***BMO Private Wealth***

Fundraisers have been essential in our sector's work of building a better world. And yet there are still many philosophies and practices holding us back and also driving many fundraisers, especially those of color, to leave the profession. How do we bring authentic joy to this fundraising? And equally as importantly, how do fundraisers fully embrace their roles as agents of justice working to create a just and equitable society? What must we let go? What should be take on? We will tackle these and other questions in a provocative presentation that will have you thinking, laughing, and eager to flip some tables over.

SPEAKER: Vu Le

15:00
15:00 - 17:00

OPTIONAL SOCIAL ACTIVITY

Vancouver Seabus Trip to Lonsdale Quay