Advanced Canadian Gift Planning Summit

AGENDA

Tuesday, April 14, 2026
RBC Convention Centre Winnipeg

7:20 – 7:50	**Buffet Breakfast & check-in**
7:50 – 8:00	**Welcome & Intro by emcee DeWayne Osborn**
8:00 – 9:00 **(Session 1)**	**One Year In: Understanding the Political Context** *Presenter: Bruce MacDonald, Imagine Canada* April 2026 marks the one-year anniversary of a new federal government. With a trade war with the US underway and the renegotiation of CUSMA looming, the laser focus on the economy, tariffs and sovereignty has affected the nonprofit sector in a number of ways. This session will examine the latest happenings in public policy advocacy and the policy ideas that are surfacing as the sector prepares for the next federal election.
9:05 – 10:05 **(Session 2)**	**Restricted Gifts and Donor "Direction" in the DAF Realm:** **A Case Study in Managing Donor Expectations and Legal Risks** *Presenters: Kate Bake-Paterson & Roger Lee, DLA Piper* We all know what DAFs are and, importantly, that donors lose control of their property once it is gifted to a DAF Foundation and cannot give on-going directions about its use. We also know that donors may give restricted gifts which effectively limit the uses that a charity can make of the gifted property, and the importance of clearly articulating these restrictions at the outset. But do donors actually understand the distinction between "restrictions" and "advice" and the limits of control that they can exercise? In this session, we will use a case study to unpack the nuances of donor engagement with restricted gifts and DAFs; how to manage the legal risks that arise when donor expectations are not properly managed, including potential for recourse with the courts; and ways in which these risks can be managed through clear communication and documentation.
10:05 – 10:30	**BREAK**
10:30 – 11:20 **(Session 3)**	**Title & Description TBC** *Presenter: Susan Manwaring, Miller Thomson*
11:25 – 12:15 **(Session 4)**	**The New Frontier of HNW Planning: Navigating Emergent Complexity in Philanthropy, Policy, and Practice** *Presenter: Troy McEachren, McCarthy Tétrault* This session addresses the "issues brewing" at the intersection of wealth management, sophisticated philanthropy, and evolving policy. We will analyze the emergent, complex trends currently reshaping the financial sector and Canadian advisor practices for high-net-worth (HNW) clients. A central focus will be the crucial planning implications surrounding philanthropy. Attendees will gain actionable insights on proactively managing risk and leveraging new opportunities in this increasingly complex landscape.
12:15 – 12:45	**Discussion & sharing**

12:45 – 1:30	**LUNCH**
1:35 – 3:00 **(Session 5)**	***Q&A with CRA: a tale of 2 Directors*** *Presenters: Blaine Langdon, Department of Finance & Robert Delaney, Charities Directorate* Come hear Blaine Langdon Director, Charities, Personal Income Tax Division, Tax Policy Branch, Department of Finance and Robert Delaney Director, Policy, Planning and Legislation Division in the Charities Directorate in a moderated session describing the hot issues, trends, and or concerns in their respective departments, as well as answering member's questions on a wide range of policies, regulations, and legislation, that governs the sector.
3:00 – 3:30	**BREAK**
3:30 – 4:20 **(Session 6)**	**Cultivating magic with AI: Practical Considerations for Nonprofits** *Presenter: Jason Shim, Canadian Centre for Nonprofit Digital Resilience* Looking to understand the latest developments in AI and how it may be relevant to nonprofits? This session is for you. This session will include an overview of what's out there, what to watch out for, and the tools that people are using across the sector. You will learn about practical examples, tactics, and tools when using AI and leave with a clearer sense of next steps for you and your organization. **Learning objectives:** 1. A broad understanding of AI tools and how they can be applied for day-to-day activities and operations. 2. An understanding of what AI can and cannot do as well as best practices for ensuring accuracy and mitigating risk. 3. Case studies and examples of AI usage in nonprofits
4:20 – 4:45	**Closing**