



Gift Planning Fundamentals

Agenda

Morning (8:00 a.m. – 12:30 p.m.)

- Introduction
 - Why Gift Planning Fundamentals and what you'll learn
 - Strategic Gift Planning
 - Charitable landscape in Canada
 - Social Capital and Values-based planning
 - Personal learning objectives
- Key Concepts
 - Primer on taxation and charity principles - glossary of terms
 - Tax treatment of a cash gift and net cost of gift
- Donor Conversations
 - Tips on getting the visit
 - Discovery questions
 - Learning the donor's story
 - Involving the donor's family
- Practicing the conversation with donors regarding their interests

BREAK: 10:05 – 10:25

- Types of Gifts
 - Gift Acceptance Policy
- Publicly listed securities
 - Tax treatment of appreciated property
 - How PLS gifts work
 - Issuing the Tax Receipt and other Administrative tips
 - Prospective donors
 - Marketing

- Charitable Bequests
 - Key points about bequests and bequest programs
 - Estate Tax basics and Estate Planning (includes probate)
 - Tax treatment of bequest gift
 - Bequest Administration
 - Talking to donors about bequests
 - Marketing Bequests
 - Recognizing, tracking and reporting on bequests
- Practicing the conversation with donors regarding gifts in a will (Group work)

LUNCH: 12:30 – 1:15

Afternoon (1:15 p.m. – 5:00 p.m.)

- Check-in
 - Case study
 - Personal action plan
- Gifts of Registered Funds
 - How they work
 - Prospective donors for gifts of Registered Funds
 - Tax treatment of gift of Registered Fund
 - Marketing and Administering Tips
- Gifts of Life Insurance
 - How they work
 - Advantages and disadvantages of LI gifts
 - Two common ways they work
 - Tax credits during lifetime
 - Tax credits for proceeds on death
 - Examples of tax treatment
 - Marketing insurance gifts
 - Administrative considerations
- Work on Case Study Project in Groups

BREAK: 3:00 – 3:20 p.m.

- Present Case Study Solutions by Group
- Where to Donate
 - Direct to Operating Charity
 - Through Donor Advised Fund
 - Through Private Foundation

- Involving Others
 - Working with Professional Advisors
- Wrap Up
- Personal Action Plan