CAGP

Advanced Canadian Gift Planning Course
June 1-3, 2016

AGENDA

Tuesday, May 31
An optional informal evening gathering will be planned for those who wish to attend

Wednesday, June 1	
8:00 a.m.	Breakfast
8:30 a.m.	Welcome and Introduction of Today's Sessions and Speakers *MC: DeWayne Osborn, Lawton Partners*
9:00 a.m.	**Trusts and Estates** *Speaker: M. Elena Hoffstein, Fasken Martineau DuMoulin LLP* New rules regarding trusts and estates have created a changing landscape for philanthropic planning in Canada which is sending many donors and their advisors back to the drawing board with respect to their estate plans.
10:30 a.m.	**Break**
11:00 a.m.	**Capacity, Undue Influence Issues and Charitable Giving** *Speaker: John Poyser, The Wealth and Estate Law Group* Delve into a recent case study where a significant and sophisticated gift involving the disposition of the family corporation shares and other property between family and a newly established foundation was jeopardized by failing capacity - what you learn will surprise you... The Institute *accredited CE (1 credit)* **Sponsored by:** Lawton Partners
12:00 p.m.	Table Conversation Lunch Join your fellow delegates to discuss various topics on collaboration **Presented by: Toronto Foundation**
1:00 p.m.	**International Philanthropy** *Speakers: Mark Blumberg, BA, LLM, Blumberg Segal* Many Canadian philanthropist are wanting to advance international causes. What are some of the considerations, cautions and options available when deciding how best to support such initiatives outside of Canada?

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1:30 p.m.	**Tax Event Gifts** *Speaker: Malcolm Burrows, Scotia Wealth Management* The best time for a donor to give a large gift is when he or she has a significant tax event. Tax events include major asset sales – like business interests, option exercises or real estate – as well as death itself. This session by one of Canada's most experienced gift planners explores the practical, tax and behavioral issues of integrating philanthropy into time-sensitive transactions involving the disposition of assets. The Institute *accredited CE (1 credit)*
2:30 p.m.	**Break**
3:00 p.m.	**Integration, Corporate Tax** *Speaker: Robert Kleinman, The Jewish Community Foundation of Montreal* Integration is the theory and practise which makes the personal - corporate Canadian tax system interact - it also answers the question as to which entity or person should make the donation. The Institute *accredited CE (1 credit)*
4:00 p.m.	Questions & Review / Free Time
5:30 p.m. – 7:30 p.m.	Working Dinner - Case Studies
8:00 p.m.	**Networking Reception** - *Optional* **Sponsored by:** Lawton Partners

Thursday, June 2	
8:00 a.m.	Breakfast
8:30 a.m.	Welcome and Introduction of Today's Sessions and Speakers
9:00 a.m.	**Emerging Donor Issues** *Speaker: Susan Manwaring, Miller Thomson LLP* Donors today are very interested in being connected and involved in their philanthropic giving. At the same time, Charities are looking for more interesting and engaging ways to encourage donors to invest in their missions. This session will canvass these emerging issues and highlight their relevance for Gift Planning and fundraising generally.
10:00 a.m.	**Break**
10:15 a.m.	**Gift Acceptance and Managing Risk** *Speakers: Mark Blumberg, BA, LLM, Blumberg Segal; Doug Puffer BSc, Simon Fraser University* Charity's policies for accepting and managing donations must be designed to protect the donor and the donee and at the same time encourage fundraisers and advisors to seek the best philanthropic strategies for clients and prospects. Charity's internal policies for accepting gifts, counting, etc. can be either limiting or liberating, but they are critical as they form the backbone of a charity.

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11:00 a.m.	**Non-Real Property Valuation – Requirements, levels** *Speaker: Greg Gillis, Lawton Partners; Amanda Salvatori MNP LLP* The valuation of private company shares, existing life insurance policies, charitable interests in trusts, and personal benefits can vary. What level is reasonable and when? Also what are the potential hidden issues when it comes to gifts of these properties to charity. The Institute *accredited CE (1 credit)*
12:00 p.m.	Networking Lunch
1:00 p.m.	**Philanthropic Review – Culminating Case Study** *Facilitator: Robert Kleinman, The Jewish Community Foundation of Montreal* Attendees will identify and build on issues/solutions discussed in the past day and a half.
2:30 p.m.	**Break**
2:45 p.m.	**Philanthropic Review, Continued**
4:00 p.m.	Questions & Review / Free Time
5:30 p.m.	Networking Dinner
7:00 p.m.	Informal discussions and networking (optional)

Friday, June 3	
8:00 a.m.	Breakfast
8:45 a.m.	Welcome and Introduction of the Symposium and Speaker
9:00 a.m.	**Tailoring the Philanthropic Discussion: from the Hourly Employee to the High Net Worth Prospect** *Speaker: Jamie Golombek, Managing Director, Tax and Estate Planning, CIBC Wealth Strategies* In this session, Jamie will share his approach on how to bring up the philanthropic discussion with different client segments and which tax strategies may work best for each group. The Institute *accredited CE (1 credit)*
10:00 a.m.	**Symposium:** **Authors of *The Philanthropic Mind*: Chuck English & Mo Lidsky followed by a donor panel discussion** **Presented by: TD**
12:00 p.m.	Networking Lunch
1:00 p.m.	Departure

2016 CFRE Approved Provider for Continuing Education

Full participation in the Advanced Canadian Gift Planning Course is applicable for 16.5 credits* 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.

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