

CAGP • ACPDP™

CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIÉS

LONDON ROUNDTABLE

TGIF Lunch and Learn Series

Friday, January 13, 2012

SESSION: Giving more than you've got: Life Insurance as a Planned Giving Tool

Life Insurance is an immensely powerful, and often underutilized planned giving tool. Properly structured, it provides an opportunity to significantly leverage the amount of money an individual is able to provide as a planned gift, and can be a fantastic tax-planning tool. Ryan's workshop will discuss the proper structure of an insurance gift, the target market for such a gift, and perhaps most importantly, conflicts between which insurance setup would be preferred by the donor vs. the charity. We will also talk about which types of insurance work best and which types of historical insurance that might already be in your organization's closet that could prove problematic if not reviewed on a regular basis. **Please note:** this will be a **very** interactive and, hopefully very entertaining session. Be prepared to be an active, hands on participant!!

FEATURED GUEST:



Ryan Fraser, CFP CIM is Director, Business Development for Freedom 55 Financial, and co-Branch Manager for Quadrus Investment Services Ltd, a division of London Life. He is responsible for the supervision, recruitment and production of Freedom 55 Financial Security Advisors in the London area, where he leads one of the company's most successful advisor teams. Professionally, Ryan's areas of expertise are complex estate and financial planning cases, and planned giving arrangements. In 2009 he was part of the Financial Planning Standard's Council's exam question bank team, which designed questions for the CFP entrance exam nationwide.

Ryan has an extensive background in the not-for profit world as well, having been co-founder and the first President of The Secrets of Radar Museum, a past board member of the London Heritage Council, current Chair of the CAGP London Roundtable, former Artistic Director of Trillium Plus Music and Letters and is a Planned Giving and Fundraising committee member for the Brain Tumour Foundation of Canada. He is also the recipient of the Ontario Volunteer Service award.

WHERE: Windermere Manor

200 Collip Circle, London, Ontario (Northwest of Western Road and Windermere Road)
Conference Room A: 2nd Floor / Directions: 519.858.1414 or <http://www.windermere Manor.com>

TIME: Lunch 11:45 a.m. - 12:15 p.m. / Session: 12:15 - 1:30 p.m.

RSVP: RSVP by January 10th USING THE ON-LINE REGISTRATION at:

Register Now!

or <http://www.regonline.com/LondonRTJan13/> Queries to jbeaton@stegh.on.ca

COST: \$30.00 CAGP Members / \$40.00 Non-members SECURE ON-LINE PAYMENT

Reservations required for all sessions. Did you register and cannot attend? Substitutions or cancellations must be made at least 48 hours prior to the event. Your registration is transferrable to another individual for this session if you are unable to attend.