

How to Join CAGP-ACDP™

On the Web:
www.cagp-acpdp.org

By phone:
1.888.430.9494

Annual membership
\$325 (incl. HST)

Annual student membership
\$85 (incl. HST)

For more information on membership
or The Presentation Series, contact:

Shamim Pirani
spirani@bccancer.bc.ca
(250) 519-5551

**Canadian Association of
Gift Planners**
Vancouver Island
Roundtable

The Presentation Series **2011-2012**

To Reserve For Events
or for more information about
The Presentation Series, contact:

Shamim Pirani
spirani@bccancer.bc.ca
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CAGP • ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DON'S PLANIFÉS

Who We Are and Why You Should Join Us!

CAGP • ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DON'S PLANIFÉS

CAGP-ACDP™ supports philanthropy by fostering the growth of gift planning. We create awareness, provide education and act as advocates of charitable giving.

We bring together professionals from various disciplines to ensure that the gift planning process achieves a fair and proper balance between the interests of donors and the aims and objectives of registered charitable organizations in Canada in accordance with the CAGP-ACDP™ Code of Ethics.

Our LEAVE A LEGACY™ program is a collaborative effort designed to preserve and improve the quality of life in our community.

It encourages people from all walks of life to make gifts through a will or other gift planning instrument to the charity or non-profit organization of their choice.

Benefits of Membership in the Canadian Association of Gift Planners

- ◆ National & local networking opportunities
- ◆ Ethical and Professional Standards
- ◆ Membership in local Roundtable
- ◆ Mentoring, idea sharing, networking, education, seminars and workshops within local Roundtable activities, CAGP-ACDP™ Planner Newsletter
- ◆ Updates on legislation affecting the technical issues of gift planning
- ◆ Reduced rates for annual conference and educational activities
- ◆ Members-only section of website provides resources, educational articles, research findings and Membership Directories
- ◆ Promotion through LEAVE A LEGACY™ the public awareness program of CAGP-ACDP™

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This Year's Presentation Series

Thursday, September 29, 2011 Third Annual Pub Night

Come knock back a drink or two and enjoy a leisurely networking visit with your colleagues in the gift planning community as we discuss CAGP_ACPDP™ membership benefits, how to get the most from your membership, and review the bursaries available to CAGP_ACPDP™ Vancouver Island members.

4:30 – 6:30 pm
The Bard & Banker Pub
Complimentary admission – bring a friend!
Generously sponsored by the Bard & Banker Pub



Tuesday, November 8, 2011 Joint Meeting with Victoria Estate Planning Council

**Guest Speaker: Hugh Bulmer, CPPA
Vice President, Maynards Fine Art &
Antiques**

Drawing on 30 years of experience in Europe and Canada, Hugh will discuss issues charities should consider when accepting gifts of fine art and other

valuable collectibles. Using real-life examples, which he describes as “tales of the unexpected”, Hugh will describe problems in valuing and distributing estate assets; problems which can result in family disharmony, legal action by beneficiaries and charities, and excessive expenditure by executors.

12:00 – 1:30 pm
Union Club of BC
805 Gordon Street, Victoria

Thursday, February 2, 2012 Social Media, The Planned Giving Groundswell

**Guest Speaker: Leah Baade, LeahBaade.com,
Copywriting & Social Media Services**

Groundswell is a relatively new social trend in which people use technology to get what they need from each other. It often diminishes the need for them to work with traditional institutions. This is particularly relevant to planned giving because social media and online giving are changing the way we need to think about building relationships with donors. Even if a large percentage of our demographic isn't likely to give online, there's a need to look forward to the future and establish online authority, credibility and relationships.

12:00 – 1:30 pm
Union Club of BC
805 Gordon Street, Victoria



April 18 – 20, 2012 - first time in Victoria! 19th Annual National CAGP_ACPDP™ Conference

Our committee has chosen the following quote by Mark Twain as the “metaphorical theme” for this conference :

“Twenty years from now you will be more disappointed by the things that you didn't do than by the ones you did do. So throw off the bowlines. Sail away from the safe harbour. Catch the trade winds in your sails. Explore. Dream. Discover.”

Gift planning is a journey through new areas of knowledge and experience, sharing stories of life's dreams along the way, and using the tools of the trade to reach the desired destination.

Whether you work for a charity, or are a professional advisor or board member, this conference is for you. Join us and hear inspiring keynote speakers, attend informative educational sessions (for all levels) and discover how to help your donors or clients “**give from the heart, give smart, give for impact**” and ensure their values live on.

For more information, visit www.cagp-acpdp.org or contact Sara Neely, Chair Host Committee at sneely@victoriafoundation.bc.ca

Plan to Make Your Wishes Come True The LEAVE A LEGACY™ Program

LEAVE A LEGACY™ is a national public awareness program designed to encourage people to leave a gift through their will, or any other gift planning instrument, to a charity or non-profit organization of their choice. The Greater Victoria LEAVE A LEGACY™ Committee is busy organizing a **SPRING EVENT** to raise awareness of the importance of thoughtful, well-planned, tax-preferred gifts and their impact on the quality of life for everyone in our communities. Your membership in the CAGP_ACPDP™ Victoria Roundtable will ensure you receive updates on this vital program.

Tuesday, June 7, 2012 Annual General Meeting

Join us for our Annual General Meeting. It will include an update from the Greater Victoria LEAVE A LEGACY™ Committee and a full report from Conference Chair Sara Neely on SET YOUR SAILS, the national CAGP_ACPDP™ conference which was held in Victoria in April.

12:00-1:30 pm
Union Club of BC
805 Gordon St, Victoria

National Philanthropy Day Monday, November 7, 2011 – Crystal Ballroom, Fairmont Empress Hotel

National Philanthropy Day celebrates local donors, volunteers and institutional partners whose outstanding gifts of time, expertise and resources contribute to the success of our community's not-for profit sector. Tables of 10 are \$325 and Individual tickets are \$35 each. Purchase a table and you can select a Distinguished Honoree at your table whose name will be announced during the event. **TO REGISTER**, please visit <http://afpvancouverisland.com/content/national-philanthropy-day-payment-options-0> Questions, please contact Tami Tate at info@npdvictoria.com or for more information, visit www.npdvictoria.com.

National Philanthropy Day on Vancouver Island is a joint project of the Association of Fundraising Professionals (AFP) and the Canadian Association of Gift Planners (CAGP_ACPDP™)