

Benefits of Membership in the Canadian Association of Gift Planners

- ❖ National and local networking opportunities
- ❖ Ethical and Professional Standards
- ❖ Mentoring, idea sharing, educational seminars and workshops
- ❖ CAGP-ACPDTM Planner newsletter
- ❖ Updates on legislation affecting the technical issues of gift planning
- ❖ Reduced rate for annual conference & educational activities
- ❖ Members-only section of website provides educational resources, Membership Directory local RoundTable membership and activities, job postings, and upcoming CAGP-ACPDTM events
- ❖ Promotion through LEAVE A LEGACYTM, the public awareness program of CAGP-ACPDTM
- ❖ Special educational offerings through the Vancouver Roundtable of the CAGP
- ❖ Opportunity to participate in Mentorship Program

Roundtable Meetings

The CAGP-ACPDTM Roundtable meetings provide high quality presentations and networking opportunities for representatives from the charitable sector as well as estate and financial planning professionals. Meetings are open to members and non-members. A discount is available to members.

Start Times

Except as otherwise listed, the meeting times are as listed below:
7:30 a.m. Breakfast and Networking
8:00 a.m. Program begins
9:30 a.m. Presentation ends

Location

To be announced

To Register

Contact: Nicole Jeschelnik
NicoleJ@vancouverfoundation.ca



How to join the CAGP-ACPDTM

On the web www.cagp-acdp.org
By phone 1-888-430-9494

Vancouver Roundtable Website
www.cagpvancouver.ca

Annual membership fee \$325
Annual student fee \$85



The Presentation Series

Canadian Association
of Gift Planners

Greater Vancouver
Roundtable

For more information on the
Presentation Series,
contact

Tim Staunton

604-675-7111

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or

Michelle Bernard

604-626-5541

mabernard@shaw.ca

2011-2012

CAGP-ACPDTM
19th Annual Conference

April 18 - 20, 2012
(Wednesday - Friday)

Location: The Fairmont Empress
Hotel, Victoria, BC

For conference details, see
www.cagp-acdp.org

CAGP-ACPDTM
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONN PLANIFIES

❖ Presentation Series

September 22, 2011 (7:00 - 9:00am)

Joint meeting with Association of Fundraising Professionals - Do You Deserve to Get Planned Gifts from Your Donors, with Harvey McKinnon

Location: Century Plaza Hotel - Burrard Ballroom, 1015 Burrard St., Vancouver

Just because you want your donors to give you planned gifts does not mean you deserve to receive them. In this session, author and fundraiser Harvey McKinnon will reveal the core questions your donors crave answers to, and show you how to answer them quickly so that your donors are inspired to give lots of planned gifts.

September 26, 2011 (9:30am - 12:30pm)

The Vision-Driven Approach to Legacy Giving, Simon Trevelyan, ST Legacy Group

Location: Surrey Libraries, City Centre, 10350 University Drive, Surrey

The Vision-Driven Approach is a revolutionary, but practical process that charities of all sizes can implement to inspire their donors to make legacy gifts. It helps organizations to focus on the things that matter to donors: the impact they have on people's lives and their vision for a better future. It also provides charities with the tools and resources they will need to build and manage successful legacy programs. The Seminar will cover:

- A strategic legacy plan
- A legacy video
- An interactive legacy website
- A legacy brand, key messaging and marketing materials
- The most effective methods for identifying legacy prospects and commitments
- A case for support
- A legacy survey
- A marketing system to ensure the message reaches all stakeholders
- Cultivation and recognition systems

Cost: Free for CAGP members, \$50 for non-members.

October 27, 2011 (7:30 - 9:30am)

Narrative Philanthropy: Discover the Narrative Approach to Building Meaningful Relationships, Norma Cameron, CFRE

Location: To be announced

Something as simple as a "well-crafted story" is the most powerful tool you can use to engage donors and build long-term, meaningful relationships. At a time when technology provides us with lots of shiny new ways to communicate at

lightning speed, organizations have an even greater need for compelling content.

Interested in learning more? Then, join Norma Cameron, storyteller, narrative consultant and fundraiser who has presented in Canada, the UK and the USA to learn how use stories strategically to take people to the frontlines of your "mission in action," and maximize the power of stories in all your communication activities. And, of course, hear some stories!

Norma Cameron is owner and principal of The Narrative Company, formed in 2006 to help people and organizations understand and apply the power of story. Norma has over 25 years' experience in fundraising, communications, organizational development and consulting. She is a faculty member for the Canadian Association of Gift Planners, and teaches their courses at the Banff Centre.

November 29, 2011 (5:30 - 8:00 pm)

**Topic: Philanthropy Options: Private Foundations versus Donor-Advised Funds - A Panel Presentation
Joint meeting with Vancouver Estate Planning Council**

Location: Law Courts Inn, 4th Floor, Law Courts Building, 800 Smithe Street

Janice Loomer Margolis will moderate this panel presentation of things a donor should consider when deciding between a private foundation and a donor-advised fund, including family, succession, administration and charitable goals. The panellists are:

- 1) Margaret Mason, Partner, Bull Housser & Tupper
- 2) Craig Hikida, Director, Donor Development & Services, Vancouver Foundation
- 3) Lauren Storer, Senior Account Manager Foundation Services, Scotiatrust

Cost: Guest fees of approximately \$60 for non-members of Vancouver EPC.

January 19, 2012 (7:30 - 9:30am)

Planned Giving Volunteers – A Panel Presentation

Location: To Be Announced

Bequests, advice, teas and beyond; the magic of volunteers in the Planned Giving world. Learn from a panel of planned giving experts representing 3 non-profit organizations about how volunteers have helped to make their jobs easier. For professional advisors, learn how you can make a meaningful contribution that benefits both the cause and you personally. The panellists are:

- 4) Carmen Murphy, Development Manager, Vancouver Opera
- 5) Joanne McLellan, Director, Gift Planning, Lion's Gate Hospital Foundation
- 6) Heather Wardle, Development Director, Seva Canada

February 16, 2012 (7:30 - 9:30am)

How to Speak to Someone Who is Dying (And Their Loved Ones), with Gay Klietzke, Vancouver Hospice Society

Location: To be announced

As Director of the Vancouver Hospice Society, Gay understands the needs of those who are facing advanced illness, death, and bereavement. She will provide insight into how best to connect with, support and enhance the lives of those who are dying, and their loved ones.

March 8, 2012 (7:30 - 9:30am)

Numbers that Count in Planned Giving, with Doug Puffer, SFU

Location: To be announced

The most important goal in directing a planned giving program is growth of new expectancies. Early efforts will sow the seeds and discover gifts already planned but previously unknown. Maturing programs must continue to generate new leads and cultivate prospects and donors for the largest gifts. Established programs might shift efforts towards stewardship but not at the cost of new expectancies. Which performance metrics will help you manage expectations and measure success? How can basic fundraising analytics keep you on track? Doug will talk about the essential numbers, actions and reports that you need to direct a planned giving program through its stages of evolution.

March 20, 2012 (5:45 - 8:00pm)

Topic TBD - Joint meeting with the Fraser Valley Estate Planning Council

Location: Eaglequest Coyote Creek, 7778 152 Street, Surrey

May 10, 2012 (7:30 - 9:30am)

Opportunities and pitfalls of insurance products as gifting vehicles, with Floyd Murphy, Murrick Insurance Services Ltd.

Location: To Be Announced

Floyd Murphy will present on:

- Gifting by life insurance beneficiary rather than through a Will
- Problems when premiums are required to maintain policies, and possible solutions
- Gifting the policy today versus gifting at death
- How to turn a modest gift into a mega gift

June 2012 (7:30 - 9:30am)

Topic: TBD

Location: To be announced