

CAGP Manitoba Roundtable Education Programs 2011 – 2012

Regular Program Costs: CAGP-ACPDPTM, Gold Associates, AFP and
 AHP Members \$30.00, Non-members, \$45.00

For Information: www.cagp-acpdp.org/en/roundtable/manitoba.aspx

Wednesday, January 18, 2012	CANCELLED
Thursday, February 16, 2012 Location: Winnipeg Winter Club (Luncheon) Registration & Networking: 11:30 am Session Begins: 12:00 pm - 1:00 pm	<p><u>Facilitators And Hindrances To Charitable Giving:</u> <u>Learning From Consumers</u></p> <p>Dr. Sergio Carvalho, F. Ross Johnson Research Fellow and Associate Professor of Marketing, Asper School of Business, University of Manitoba</p> <p>Who should attend: Gift Planners, Fundraising Professionals, Advisors</p> <p>Back by popular demand after an extremely well-received presentation at Kaizen 2011, Dr. Carvalho will discuss his research that examines how aspects of consumers’ many social identities influence their behavior. His insights will help charities better understand the kinds of messages that our donors and stakeholders will best respond to, and the things to avoid in our messaging. This powerful presentation is important not just for the fundraisers and planned giving staff in your organization, but also for communications and marketing staff, senior executives and board members and volunteers. This is a session not to be missed!</p> <p>Fellow and Associate Professor of Marketing at the Asper School of Business, University of Manitoba in Canada. He received his Ph.D. in Business/Marketing from Baruch College/The Graduate School of the City University of New York, his MBA in Finance from Northeastern University, and his BBA from the University of Fortaleza, Brazil. In addition, he completed two Post Graduate Diplomas – in International Business at the Ecole Supérieure de Commerce in France and in Finance at FGV-Fundacao Getulio Vargas in Brazil.</p> <p>Dr. Carvalho’s research and teaching cover consumer behavior and international marketing. In particular, his research examines how aspects of consumers’ many social identities influence their behavior. Under this framework, he investigates how psychological distance influences consumers’ perceptions of risk; how social categorization</p>

	<p>influences consumers’ pro-social behavior and response to corporate social responsibility initiatives; and how consumers’ react to product recall warnings. His research is currently funded by grants from the Social Sciences and Humanities Council of Canada and from the Canadian Minister of Human Resources and Skills Development. His research has resulted in publications in major journals and presentations at international conferences in marketing and consumer behavior.</p> <p>Dr. Carvalho has presented his papers at the Conferences of the Academy of International Business, Association for Consumer Research, European Association for Consumer Research, Society for Consumer Psychology, and American Marketing Association. As a university instructor at both the graduate and undergraduate levels, Dr. Carvalho has taught courses in a range of marketing disciplines, focusing on consumer behavior, consumer research, and business strategy (international and domestic.) He has taught in the US, Canada, Finland, Switzerland, Taiwan, Hong Kong, Singapore, Israel and Brazil. His efforts as an instructor were recognized with the most prestigious teaching award given by the University of Manitoba, The Olive Beatrice Stanton Award for Excellence in Teaching in 2009. In addition, he received the University of Manitoba-UMFA Merit Award for teaching for four consecutive years (2007, 2008, 2009, and 2010). In the USA, he was nominated for the 2003 Presidential Excellence Award for Distinguished Teaching and received the 2004 Dean’s Distinguished Teaching Award both at Baruch College, The City University of New York.</p> <p>Dr. Carvalho’s work experience included marketing and financial executive positions and a year in general management as the General Manager of the BMC Bank in Sao Paulo. From academic training in the US, France and Brazil, his perspective was widened to include an experiential understanding of the cultural operators that influence business processes.</p>
<p>Thursday, March 8, 2012 Location: Winnipeg Winter Club Registration and Networking – 8:00 a.m. Session Begins: 8:30 am to 9:30 am</p>	<p><u>Estate Administration, The Forgotten Component of Stewardship</u> Peter Glowacki, LL.B Thompson Dorfmann Sweatman LLP Liz Kovach, Donor Relations Manager, Heart and Stroke Foundation of Manitoba Who should attend: Gift Planners, Fundraising Professionals, Advisors</p> <p>Estate administration is a task that is often overlooked and donations that should be mobilizing the mission of charities are often sitting in a trust account. Charities have rights and this session will provide</p>

	<p>guidelines, tips, and red flags to look for to help charitable organizations navigate through the administration process to ensure that donors' wishes are carried through.</p>
<p>Thursday, April 12, 2012 Location: Winnipeg Winter Club Registration and Networking – 8:00 a.m. Session Begins: 8:30 am to 9:30 am</p>	<p><u>Planning Paralysis</u> Pat O'Connor, CFP, CLU, Ch.F.C., TEP Founder and President – Blackwood Wealth Planning Who should attend: Gift Planners, Fundraising Professionals, Advisors</p> <p>How to help your clients and donors move ahead with strategies with confidence.</p>
<p>Thursday, May 10, 2012 Location: TBD Charity Fair and Luncheon 8:00 am Registration, Networking 8:30 am Breakfast and Special Guest Speaker 9:30 Visit Charity Fair Booths 10:30 - 11:30 Workshops 11:30 Visit Charity Fair Booths 12:00 pm – 1:30 pm CAGP Awards, Luncheon and Keynote Speaker 1:30 - 2:00 Visit Charity Fair Booths</p>	<p><u>Leave a Legacy Month</u> Mini Charity Fair and Workshop CAGP Manitoba Awards Luncheon</p> <p>Who should attend: General Public, Donors, Gift Planners, Fundraising Professionals, Advisors</p>
<p>Tuesday, June 12, 2012 Location TBA Luncheon and Afternoon Golf</p>	<p><u>Annual General Meeting and S'Quitter Ball Golf Tournament</u></p>