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# CAGP • ACPDP™

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

## CANADIAN GIFT PLANNING: THE ADVANCED COURSE

September 22 – 27, 2009  
Whistler Village, BC

### AGENDA

#### ❖ TUESDAY, SEPTEMBER 22

3:00 – 4:30 p.m.	Arrival and Registration	
5:30 - 6:30 p.m.	DINNER	
6:30 – 7:15 p.m.	<b>Welcome and Intro Session</b>	
	<b>Instructor Introductions</b>	Susan & Malcolm
	<i>New Trends in Gift Planning</i>	Malcolm
7:15 – 9:00 p.m.	<b>Opening Reception and Participant Introductions</b>	

#### ❖ WEDNESDAY, SEPTEMBER 23

7:00 - 8:30 a.m.	BREAKFAST	
8:30 – 9:00 a.m.	<i>Introducing the Case Studies</i>	Susan & Malcolm
9:00 – 10:15 a.m.	<i>Charity Law and Regulation, PT 1</i>	Susan
10:15 – 10:30 a.m.	Break	
10:30 – 12:00 p.m.	<i>Charity Law and Regulation, PT 2, Tax &amp; Planning Concepts</i>	Malcolm
12:00 p.m.	Class Photograph	
12:15 - 1:00 p.m.	LUNCH	
1:00 – 2:15 p.m.	<i>Enduring Property and Endowments</i>	Susan
2:15 – 2:30 p.m.	Break	

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2:30 – 3:45p.m.	<i>Bequests &amp; RRSPs/RRIFs</i>	Malcolm
3:45 – 4:00 p.m.	Break	
4:00 – 5:00 p.m.	<i>Cross-Border Issues</i>	Susan
5:00 – 5:30 p.m.	<b>ASSIGNED GROUPS MEET FOR ASSIGNMENT 1</b>	Group Work
5:30 - 7:30 p.m.	DINNER	

**Free Evening  
Optional Hike with Instructors**

❖ **THURSDAY, SEPTEMBER 24**

7:00 - 8:30 a.m.	BREAKFAST	
8:30 - 9:00 a.m.	<i>Review of Assignment 1</i>	Malcolm/All
9:00 - 10:15 a.m.	<i>Life Insurance</i>	Malcolm
10:15 - 10:30 a.m.	Break	
10:30 - 12:00 p.m.	<i>Gifts of Public Securities</i>	Susan & Malcolm
12:00 - 1:00 p.m.	LUNCH	
1:00 – 2:15 p.m.	<i>Entrepreneur Donor: Gifts involving Private Companies</i>	Susan & Malcolm
2:15 – 2:30 p.m.	Break	
2:30 – 4:00 p.m.	<i>Donor Advised Funds &amp; Private Foundations</i>	Malcolm
4:00– 4:15 p.m.	Break	
4:15 – 5:00 p.m.	<i>Talking Philanthropy: Issues for Charities</i>	All
5:00 – 5:30 p.m.	<b>ASSIGNED GROUPS MEET FOR ASSIGNMENT 2</b>	Groups
5:30 - 7:00 p.m.	DINNER	

**Free Evening  
Optional Hike with Instructors**

❖ **FRIDAY, SEPTEMBER 25**

7:00 - 8:30 a.m.	BREAKFAST
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8:30 – 9:00 a.m.	<b><i>Review of Assignment 2</i></b>	Malcolm/All
9:00 - 10:15 a.m.	<b><i>Life Income Gifts: Gift Annuities &amp; CRTs</i></b>	Malcolm
10:15 – 10:30 a.m.	Break	
10:30 - 12:00 a.m.	<b><i>Real Estate, Eco Gifts &amp; Gifts of Residual Interest</i></b>	Susan
12:00 p.m.	LUNCH	
	Assignment 3 & Case Study (Assignment 4)	Groups

**Free time for remainder of day except for Assignment 3 & Case Study  
Optional Mountain Hike**

5:30 - 7:30 p.m. DINNER & Free Evening

❖ **SATURDAY, SEPTEMBER 26**

7:00 - 8:30 a.m.	BREAKFAST	
8:30 - 9:15 a.m.	<b>Cultural Properties</b>	Malcolm
9:15 – 10:15 am	<b><i>Donation Tax Shelters</i></b>	Susan
10:15 - 10:30 a.m.	Break	
10:30 – 12:00 p.m.	<b><i>Ethical and Liability Issues for Charities &amp; Advisors</i></b>	All
12:00 - 1:00 p.m.	LUNCH	
1:00 - 2:30 p.m.	<b><i>Presentation of Case Studies</i></b>	Groups 1 to 4
2:30 - 2:45 p.m.	Break	
2:45 - 3:30 p.m.	<b><i>Presentation of Case Studies</i></b>	Groups 5 & 6
3:30 – 4:15 p.m.	<b><i>Talking Philanthropy: Issues for Professional Advisors</i></b>	All
4:15 – 5:00 p.m.	<b><i>Why Philanthropy?</i></b>	Malcolm
6:00 - 7:00 p.m.	RECEPTION, hosted by CAGP•ACPDPTM	
7:00 – 9:00 p.m.	BANQUET	

❖ **SUNDAY, SEPTEMBER 26**

7:00 - 9:00 a.m.	BREAKFAST (BUFFET)
AFTER BREAKFAST	DEPART

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