



SET YOUR SAILS

Explore. Dream. Discover.

CAGP-ACPDTM Conference
April 18-20, 2012 | Victoria, BC

CONFERENCE REGISTRATION FORM

To register on-line go to: www.cagp-acpdp.org

To register by mail or fax, please complete both sides of this form and send together with payment to:

CAGP-ACPDTM Conference
325 Dalhousie Street, Suite 201
Ottawa, ON K1N 7G2
Tel: (613) 232-7991 or (888) 430-9494
Fax: (613) 232-7286

Website: www.cagp-acpdp.org
E-mail: conference@cagp-acpdp.org

DELEGATE INFORMATION

First Name: _____ Last Name: _____ Designation(s): _____

Job Title: _____

Organization: _____

Address: _____

City: _____ Prov/State: _____ Postal Code/Zip Code: _____

Telephone: () _____ E-mail: _____

Special dietary or mobility requests: _____

Emergency Contact Information

Contact Name: _____

Day Phone: () _____ Night Phone: () _____

I have my CFRE

This is my first CAGP-ACPDTM Conference

I would like to volunteer to moderate a session at the conference

I do not grant permission to CAGP-ACPDTM to publish my contact information, as listed above, in the conference delegate list made available to attendees and sponsors.

Please complete the other side – Conference Registration Fees

PREMIER CONFERENCE SPONSOR:



RBC Wealth Management



SET YOUR SAILS

Explore. Dream. Discover.

CAGP-ACPDTM Conference
April 18-20, 2012 | Victoria, BC

CONFERENCE REGISTRATION FEES

Early Bird
(Until Feb 24, 2012)

Regular
(After Feb 24, 2012)

FULL CONFERENCE FEES

Member or Gold Associate*:	\$710	\$820	\$ _____
Non-member:	\$999	\$1112	\$ _____

* In order to benefit from the "member rate", you need to be a member in good standing while attending the conference

ONE DAY FEES

Wednesday	\$325	\$425	\$ _____
Thursday*	\$325	\$425	\$ _____

* Thursday banquet ticket not included

HALF-DAY FOR PROFESSIONAL ADVISORS

(Fee applies only if attending this session and not the full conference)

Friday 7:00 – 1:00	\$250	\$250	\$ _____
--------------------	-------	-------	----------

GIFT PLANNING-ALL IN A DAY

PRECONFERENCE - APRIL 17 8:00 – 5:00

Member or Gold Associate:	\$215	\$215	\$ _____
Non-member:	\$270	\$270	\$ _____

OPTIONAL SOCIAL ACTIVITIES – BOOKING DEADLINE APR 2

(Not included in the conference fees)

Vancouver Island RT Social Event:	_____ tkts x \$45	\$ _____
Pacific Opera Victoria:	_____ tkts x \$67	\$ _____
Extra Thursday banquet ticket*:	_____ tkts x \$103	\$ _____

(* One Thursday banquet ticket is included in the full conference registration fee)

Subtotal Conference Fees \$ _____

12% HST - Registration number: 870678299RT0001 \$ _____

Processing Fee \$ 5.00

Total Conference Fees \$ _____

PAYMENT OPTIONS

VISA MasterCard® Cheque (payable to CAGP Victoria 2012)

Credit Card number: _____ Expiry date: _____

Name on card: _____

I authorize payment for total conference fees by credit card:

Cardholder Signature _____

Cancellation and Refund Policy

Cancellations are subject to a \$200 administration fee. No refunds for cancellations received after March 16, 2012. No shows forfeit the full registration fee. Substitutions are accepted from the same organization. The cancellation fee can be used as a credit towards the next year's conference for the registered person or their organization.

Please complete the other side – Conference Registration Form



SET YOUR SAILS

Explore. Dream. Discover.

CAGP-ACPDTM Conference
April 18-20, 2012 | Victoria, BC

WORKSHOP SESSION SIGN-UP FORM


First Name: _____ Last Name: _____

Telephone: _____ E-mail: _____


Please indicate your first (1) and second (2) choice of session per timeslot, as space is limited.

 simultaneous translation

WEDNESDAY APRIL 18, 2012 9:15 - 10:45 a.m.

- _____ Gift Planning Technical Overview (Introductory) *W1.1*
- _____ Managing the Relationship Web (Estate Administration) (Intermediate) *W1.2*
- _____ Social Enterprises: Part One-Overview (Advanced) *W1.3*
- _____ Building Your Case Through the Donor's Eyes  (General) *W1.4*
- _____ Explore Your Personal Narrative (General) *W1.5*


WEDNESDAY APRIL 18, 2012 11:15 a.m. - 12:15 p.m.

- _____ Tips & Templates-Working Your Legacy Program (Introductory) *W2.1*
- _____ Life Insurance (Intermediate) *W2.2*
- _____ Foundations and Endowments as Tools (Intermediate) *W2.3*
- _____ Social Enterprises: Part Two-Panel Discussion (Advanced) *W2.4*
- _____ Superlative Donor Care  (General) *W2.5*


WEDNESDAY APRIL 18, 2012 2:15 - 3:15 p.m.

- _____ Demystifying the Gift Planning Conversation (Introductory) *W3.1*
- _____ Building Endowment Gifts (Intermediate) *W3.2*
- _____ How to Train Your Dragon: Managing Data (Intermediate) *W3.3*
- _____ Exploring the Canadian/U.S. Tax Implications of Gifting (Advanced) *W3.4*
- _____ High Net Worth Clients: One Size Does Not Fit All  (General) *W3.5*


THURSDAY APRIL 19, 2012 9:15 - 10:45 a.m.

- _____ The Straight Goods on Receipting Bequests (Intermediate) *W4.1*
- _____ Essential Charity Law Update (Intermediate) *W4.2*
- _____ Numbers That Count: Performance Metrics & Analytics  (Intermediate) *W4.3*
- _____ Ethical Considerations in Gift Planning (Intermediate) *W4.4*
- _____ Seeing the Person Behind the Resume (Advanced) *W4.5*
- _____ Planning & Giving for the High Net Worth Individual (Advanced) *W4.6*


THURSDAY APRIL 19, 2012 11:15 a.m. - 12:15 p.m.

- _____ Testamentary Gift Planning (Intermediate) *W5.1*
- _____ Business Succession & Legacy Planning (Advanced) *W5.2*
- _____ 20 Great Places for Narrative in Your Program (General) *W5.3*
- _____ Designer Endowments  (General) *W5.4*
- _____ Whose Role is it Anyway? The Effective Gift Planning Team (General) *W5.5*
- _____ Marketing Drives Growth for Your Organization (General) *W5.6*
- _____ Sponsor Demonstration-Gryphon Consulting (General) *W5.7*


THURSDAY APRIL 19, 2012 2:00 - 3:00 p.m.

- _____ The Anatomy of a Lawsuit (Introductory) *W6.1*
- _____ Human Dimensions- Talking About Death & Dying (Intermediate) *W6.2*
- _____ Is the Internet Losing You Gifts  (Intermediate) *W6.3*
- _____ Donor Rights and Remedies (Intermediate) *W6.4*
- _____ Donations of Land (Intermediate) *W6.5*
- _____ I Wanted to Give Back (General) *W6.6*
- _____ Sponsor Demonstration - T.E. Wealth (General) *W6.7*

THURSDAY APRIL 19, 2012 3:45 - 4:45 p.m.

- _____ Out of the Cold - Turn Your Lists to Visits (Introductory) *W7.1*
- _____ Building Productive Relationships (Intermediate) *W7.2*
- _____ When to Issue Charitable Receipts (Advanced) *W7.3*
- _____ Top Ten Things Donors Are Asking  (General) *W7.4*
- _____ Grooming Yourself as the Non-Profit Leader of Tomorrow (General) *W7.5*
- _____ CAGP-ACPDTM Government Relations (General) *W7.6*

FRIDAY APRIL 20, 2012 9:15 - 10:45 a.m.

- _____ Gifts from the Neglected Mid-income Canadian (Intermediate) *W8.1*
- _____ Tracking Planned Giving Activity & Results (Intermediate) *W8.2*
- _____ Introduction to Gifts From Private Companies (Intermediate) *W8.3*
- _____ Recent Legislative and Policy Changes  (General) *W8.4*
- _____ Beyond Bequests: Tools and Tips (General) *W8.5*

Please complete the reverse side of this form – Toolbox Topic Session Sign-up Form

Please return this form to the CAGP-ACPDTM National office:

**325 Dalhousie Street, Suite 201
Ottawa, ON K1N 7G2
Fax: 613-232-7286
E-mail : conference@cagp-acpdp.org**



SET YOUR SAILS

Explore. Dream. Discover.

CAGP-ACPDPTM Conference
April 18-20, 2012 | Victoria, BC

TOOLBOX TOPIC SIGN-UP FORM

First Name: _____ Last Name: _____

Organization: _____

Telephone: _____ E-mail: _____

Please choose only one Toolbox topic but indicate a second choice in case the table is full. Please note: Topic discussions are limited to tables of eight.

THURSDAY APRIL 19, 2012

12:30 - 2:00 p.m

- _____ Faith-based Gift Planning
- _____ Gift Planning in the Small Charity
- _____ Gift Planning in the Health Field
- _____ Gift Planning in the Education Sector
- _____ Gift Planning in the Cultural Sector
- _____ Tracking & Benchmarking Your Planned Giving Activities
- _____ The Donor Visit
- _____ Marketing to Various Demographics
- _____ Integrating a Planned Giving Goal into an Overall Campaign
- _____ Starting the Conversation- Talking to Donors/Prospects about Planned Giving
- _____ Managing Your Endowments Today
- _____ Annuities
- _____ CAGP-ACPDPTM Government Relations
- _____ Working with Professional Advisors
- _____ Ethics in Gift Planning
- _____ Working with a Volunteer Planned Giving Committee
- _____ Social Enterprise
- _____ CFRE Accreditation
- _____ What to do in the Market in Difficult Times
- _____ Stewarding Donors Who Give Through Donor Advised Funds
- _____ Working with an Aging Population

Please complete the reverse side of this form – Workshop Session Sign-up Form

Please return this form to the CAGP-ACPDPTM National office:

**325 Dalhousie Street, Suite 201
Ottawa, ON K1N 7G2
Fax: 613-232-7286
E-mail : conference@cagp-acpdp.org**

