

# CAGP • ACPDP™

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

## LONDON ROUNDTABLE

### TGIF Lunch and Learn Series

Friday, January 8, 2010

#### **SESSION: Asking for Planned Gifts - Taking the Fear Out of the Ask**

We will expose the most common fundraising mistakes, learn how to avoid them, and show how to become skilled at identifying personality traits and tailor your message to fit various personalities – even on the fly! This session also offers ideas on how to take the fear out of asking for **and getting** planned gifts!

#### **FEATURED GUEST:**



**Malcolm  
Burrows**

Malcolm is a philanthropic planner and advisor to private clients and leads Canada's largest national private foundation business. He joined the Scotiabank Group® in 2004 after spending 13 years with three major Toronto charities and is the Head of Philanthropic Advisory Services, Scotiatrust.

Malcolm obtained his Bachelor of Arts Degree from the University of Toronto. He is active in the charitable sector as a speaker, writer and he is frequently quoted by the media. Malcolm is Course Director for the Canadian Association of Gift Planners' Advanced Canadian Gift Planning Course -- the longest running course in Canadian philanthropy. As past-chair and member of the Government Relations Committee of the Canadian Association of Gift Planners he has contributed to the development of new charitable tax incentives, including the elimination of capital gains on gifts of public securities.

Malcolm is the editor-at-large for the monthly newsletter *Gift Planning in Canada*, member of the editorial committee of the quarterly journal *The Philanthropist*, and author for the C.D. Howe Institute on charitable tax policy. He was instrumental in the creation of *Charitable Options*, a category of stock options approved by the Toronto Stock Exchange.

#### **WHERE: Windermere Manor**

200 Collip Circle, London, Ontario (Northwest of Western Road and Windermere Road)

Conference Room A: 2nd Floor / Directions: 519.858.1414 or <http://www.windermere Manor.com>

**TIME:** Lunch 11:45 a.m. - 12:15 p.m.      Session: 12:15 p.m. - 1:30 p.m.

**RSVP:** RSVP by January 5th USING THE NEW ON-LINE REGISTRATION at [http://www.cagp-acpdp.org/en/roundtable/ontario/on\\_london.aspx](http://www.cagp-acpdp.org/en/roundtable/ontario/on_london.aspx) / Queries to [jbeaton@stegh.on.ca](mailto:jbeaton@stegh.on.ca) or 519.631.2030, x2727

**COST:** \$25.00 CAGP Members/\$40 Non-members SECURE ON-LINE PAYMENT

*Reservations required for all sessions. Did you register and cannot attend? Substitutions or cancellations must be made at least 48 hours prior to the event. Your registration is transferrable to another individual for this session if you are unable to attend.*

The purpose of the Canadian Association of Gift Planners is to support philanthropy by fostering the development and growth of gift planning. The Association creates awareness, provides education and is an advocate of charitable giving.

The Association brings 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-ACPDPTM Code of Ethics.