Thursday May 13, 2010

9:15 - 10:45 a.m. Workshop Sessions #2

W2.1 Legacy Marketing - Are You in the Game or on the Bench? -Introductory
You can't just sit in your office and do things the same old way. Demographics are changing, expectations are changing, how people interact with you and your charity is changing. Are you in the game or on the bench? Assess your marketing strategies by attending this workshop where you'll get the play-by-play on the latest and greatest ways to score in Legacy Giving.
Helen DeBoer-Daggett, Norfolk General Hospital Foundation

W2.2 Managing Endowments in Difficult Economic Times - Intermediate
This session will explore the challenges faced by gift planners and charities in an economic downturn. Participants will learn about the legal constraints in the use of endowment funds including requirements under the Income Tax Act, Charities Accounting Act of Ontario and the Trustee Act; compliance with the restrictions imposed by donors; and the ongoing legal management of endowed gifts and how to protect them from creditors.
M. Elena Hoffstein LL.B., Fasken Martineau DuMoulin LLP

W2.3 Donor Disasters: Management and Avoidance - Intermediate
Can a charity return a donation? What should a charity do when a family contests a bequest? What steps can an organization take to avoid these problems? This diverse panel will share their experience and practical advice on the legal and practical ways of managing difficult donor situations.
Diana Arajs, Poise Communications; Rachel Blumenfeld LL.B. and Kate Lazier LL.B., Miller Thomson LLP; Jill Nelson CFRE, Princess Margaret Hospital Foundation

W2.4 Planned Giving and Direct Marketing: Working Together to Increase Expectancies - Intermediate
Médecins Sans Frontières/Doctors Without Borders (MSF) Canada & WWF-Canada will present case studies highlighting the strategies, lessons learned & successes from their respective legacy marketing campaigns. Both MSF and WWF-Canada are national organizations working within global movements and both work with limited human resources dedicated to planned giving.
Maya Ahmad, WWF-Canada; Janice St-Denis, Médecins Sans Frontières (MSF)

W2.5 Gift Planning and the Family Business - Advanced
This session will examine a number of gift plans involving the family business and incorporating estate planning with gift legacy planning. The content will be presented to the participants as if he/she is the business owner. Thus both ideas and presentation techniques will be covered in this workshop.
Robert Kleinman FCA, Jewish Community Foundation of Montreal

W2.6 Once upon a time… - All
We connect and communicate with each other by sharing stories whether through books or movies, emails or text messages. Great fundraisers know how to tell great stories. And our donors respond best when they hear compelling and moving stories about your cause and your organization. Learn how to extract and record a good story and how to incorporate stories into your fundraising program.
Leah Eustace CFRE, FLA Group

Thursday May 13, 2010
11:30 a.m. - 12:30 p.m. Workshop Sessions #3

W3.1 Life Insurance 101- Introductory
Work better, not harder to get bigger gifts from your donors through life insurance. In this interactive workshop you will learn how to approach donors with life insurance; how donors can give 25% of their estate to their organization and still leave 100% to their heirs; and how to use life insurance concepts to attract major corporate gifts.
Alain Lévesque, DeVimy Group

W3.2 Using the Media - A Gift Planner's Greatest Tool- Intermediate
Your charity's message conveyed through various media has a significant influence on the growth of your planned giving program. This session will look at communication ideas to turn both donors and potential donors into bequest donors. The importance of good messaging, media forms that work, examples of ads, ideas about budgeting and stories which get results will be explored to enhance your gift planning program.
Carey Bornn, Union Gospel Mission

W3.3 Working with High Net Worth Clients with Corporations- Advanced
High net worth clients and entrepreneurs often have private corporations with significant investment portfolios. Planning how to withdraw these funds from the companies in a tax effective manner is often overlooked. This session will explore strategies that allow the philanthropic minded shareholder to withdraw funds tax effectively.
Jo-Anne Ryan PFP, TD Waterhouse

W3.4 The Year on Your Government Relations Committee - All
The panel, headed by the Chair of the CAGP-ACPDP™ Government Relations Committee, will provide a detailed presentation on the new Fundraising Policy adopted by CRA; will review the current developments in the Charitable Remainder Trust proposal and will review any new legislation that came forward from the 2010 budget announcements (unknown at the time of printing). This session offers an opportunity for participants to pose questions to panel experts – including a CRA representative. So bring along your most pressing questions and join the GRC Committee as they review the year – focusing on the most recent legislation.
Moderator: Susan Manwaring LL.B., Miller Thomson LLP

W3.5 Integrating Planned Giving to Ministry at the Congregational Level - All
This session is a case study of how planned giving was introduced to a growing congregation. By integrating stewardship into the baptismal covenant, a planned gift becomes a natural extension of ministry.
Peter Bennett, Blueprint Wealth & Estate Planning Inc.

W3.6 Arnold and Rowena - Conversation with a Donor - All
What turns donors on or off? What do they really think about our pitches? What motivates a donor to give? How can we earn their trust - or lose it? Hear from Arnold, a graduate of Carleton University, who is candid, articulate and interested in providing perspective to help us be better at attracting and retaining philanthropic support.
Rowena Griffiths, Carleton University; Arnold Bradley

Thursday May 13, 2010
2:00 - 3:00 p.m. Workshop Sessions #4

W4.1 Legacy Direct Mail: One Gift Planner's Experience - Introductory
Not all donors want to sip tea with you! Discover how to cast a wider net with bequest prospects who don't want to meet you face-to-face. Find out ways to create a more meaningful experience for donors through a strategically targeted direct mail program and hear what they have to say.
Linda Clemow CFRE, The Lung Association

W4.2 Insured Annuities: Strategy to Increase Income - Intermediate
This session will look at variations on funding to increase the annual cash flow to the donor and lock down the insured gift to the charity. Tax advantages including pension credit, pension splitting, OAS claw back recovery will be reviewed.
Brenda McEachern LL.B., TEP, Canada Life

W4.3 Implications of Disbursement Quota Reform - Advanced
This pressentation will reivew the proposal in the 2010 federal budget on eliminating the 80% disbursement quota and related complicated concepts (such as enduring property, capital gains pool and specified gifts), as well as increasing the exemption from the 3.5% disbursement quota. The presentation will also review the implications of the disbursement quota reform on charities, including what should charities do in the mean time, what the remaining 3.5% disbursement quota would mean for charities, what to do with existing endowments, etc.
Theresa L.M. Man LL.B., Carters Professional Corporation

W4.4 Basic Tax Considerations in Gift Planning - All
This survey focuses on providing the attendee with a basic understanding of the key tax considerations that a gift planner needs to know in order to effectively structure a gift when communicating with a donor. The seminar will be of interest to those commencing their career in gift planning, as well as the more seasoned gift planner.
Terrance Carter LL.B., Carters Professional Corporation; Laura West LL.B., Fasken Martineau DuMoulin LLP

W4.5 Moving Forward with Socially Responsible Investing - All
Donors' interest level in socially responsible investing continues to grow. Has your organization been responsive to this evolution? There are challenges that arise when board and investment committees consider socially responsible investing and we will explore some of these challenges and how to address them. You'll also receive an action plan to get your organization "moving forward".
Alison Parry CFA, CA; Melissa Best CFA, MBA and Ann E. Jackson CFA, MBA, Phillips, Hager & North Investment Management Ltd.

W4.6 All You Need is Love - The Passion of Philanthropy - All
John Lennon was right. Love is all we need. Nothing will motivate your donor or prospect to give more than passion for your cause and love for the people your organization helps. Fraser Green has spent the last two years studying how love, passion and the subconscious mind play a major role in the decision to give. Through an engaging combination of sharing his research - and powerful storytelling - Fraser will show participants how they can take their donors to the emotional place where success happens.
Fraser Green CFRE, FLA Group

Thursday May 13, 2010
3:45 - 4:45 p.m. Workshop Sessions #5

W5.1 Tips, Templates, Samples and Examples - Introductory
What works and what doesn't work in a gift planning program? This session will share tips, templates, samples and examples from a successful gift planning program that started from scratch. Tips for using your database, donor research, legacy tracking, relationship building and stewardship will help you generate donor loyalty and gifts.
Peter Chipman BBA CFRE, Variety - The Children's Charity of BC

W5.2 Navigating a CRA Audit and Living to Tell the Tale - Intermediate
With new rules concerning the taxation and administration of charities, an audit is inevitable. Charities need to know and understand their obligations before and during an audit in order to ensure compliance from both the donor and the charity, including those issues arising from gift planning. This seminar will prepare you for CRA audits and supply you with a checklist for the Charity Audit Program.
Karen J. Cooper LL.B., Carters Professional Corporation

W5.3 How to Get to a Yes - Intermediate
Everyone knows that a moves-management plan is supposed to end with an "ask", but the faint of heart often shrink from the final step or mishandle it. This session will discuss the process for bringing both a planned and a major gift to closure by discerning a donor's motivation, asking in the right way, overcoming objections, and being creative.
Frank Minton, PG Calc Incorporated

W5.4 Green Gift Planning: Have Your Clients Seeing Green! - Advanced
The Ecological Gifts Program offers an income tax tool for clients who count rural or wilderness lands among their assets and who wish to leave a legacy for future generations. This session provides both a national and local perspective on the use of this effective and attractive gift mechanism.
Don Gordon CFRE, Thames Talbot Land Trust; Dawn Laing MSc., Canadian Wildlife Service, Environment Canada

W5.5 Capacity-When to Continue Discussions - All
Not available at time of printing
Sandra L. Enticknap LL.B., Miller Thomson LLP; Dr. Arlin Pachet, Pachet Assessment and Rehabilitation Services

W5.6 Developing an Effective Case for Support – Sharing Best Practices - All
The session will cover a proven methodology for developing an effective case for support for fundraising; why "testing the case" is so important; and how to conduct an internal and external community audit to engage staff, board, volunteers, donors and prospects in the case development process. There will be group discussion and participants will be encouraged to share best practices and lessons learned.
Suzanne M. Dubé MA, CFRE, Victoria Women's Transition House