PLANNED GIVING: HARNESSING THE POWER

NIAGARA FALLS 2009 · APRIL 22-24

CAGP•ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONS PLANIFIÉS

Conference Programme

16TH Annual National CAGP•ACPDP™ Conference

Sheraton on the Falls, Niagara Falls, ON

April 22-24, 2009

An educational conference for gift planners, fundraisers and professional advisors.

RBC

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Celebrating 12 years in partnership with CAGP-ACPDP™

WELCOME COLLEAGUES

Welcome to Niagara Falls! We hope that your stay is enjoyable and that you will take advantage of all the sights and sounds of our dynamic city and area.

There will be many new and exciting things for you to discover about gift planning during the 16th Annual National CAGP-ACPDP™ Conference. *Harnessing the Power* is our theme for the conference this year and we anticipate the most experienced professionals as well as newcomers to the field will find our program provides the latest insight into gift planning.

Savour every moment of the Conference and your visit to Niagara Falls. Take advantage of the workshops and networking with colleagues in order to maximize your knowledge but also take time to discover what the Niagara area has to offer.

Mary Kay Aird
CAGP-ACPDP™
Host Advisory Committee Chair

DEAR FRIENDS AND COLLEAGUES,

This year the 2009 Host Advisory Committee chose the theme Harnessing the Power. I invite you to join them in their city – Niagara Falls – to learn how to capture (and harness) the essence of gift planning. When you begin to understand the possibilities of gift planning both for a donor and for a charity, you understand the "power". Join us as we delve into the growing world of gift planning to enhance your profession and hopefully, walk away with the knowledge to make the changes you need to make – indeed "Harnessing the Power" of this profession and its abilities to change philanthropy in Canada.

Diane MacDonald
Executive Director, CAGP-ACPDP™

2009 CONFERENCE HOST ADVISORY COMMITTEE

Committee Chair

Mary Kay Aird
United Way of Burlington & Greater Hamilton

Committee Members

Gail Berry-Graham CFRE
The Leprosy Mission Canada

Teanna Brown
Brock University

Helen Callaway
Hamilton Community Foundation

Cindy Carson
Brantford General Hospital Foundation

Tamara Coleman-Lawrie
Wesley Urban Ministries

Barbara French
Burlington Art Centre

Lisa Gonnering
Hamilton Health Sciences Foundation

Mary Goodfellow
Juvenile Diabetes Research Foundation

Nancy Handrigan
Joseph Brant Memorial Hospital Foundation

Patti Johnstone
Milton District Hospital Foundation

Linda Syrota-Sullivan, CFRE
Canadian Red Cross, Ontario Zone

2009 NATIONAL PROGRAM COMMITTEE

Committee Chair

Michelle M.B. Osborne, CFRE
University of Toronto

Committee Members

Helen DeBoer-Daggett
Norfolk General Hospital Foundation

Lydia Potocnik, LL.B.
St. Joseph's Healthcare Foundation

M. Jasmine Sweatman, LL.B., TEP, LL.M., E.C., EPC
Sweatman Law Firm

We wish to recognize and thank all of our sponsors:

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The organizations listed were confirmed at time of printing.

Registration

To register, complete the registration and session sign-up forms or visit our secure registration site at www.cagp-acpdp.org. If you have any questions, please contact the CAGP-ACPDP™ National Office at 1-888-430-9494.

Registration Onsite Location and Hours

Registration takes place in the Great Room Foyer, 3rd Floor of the Sheraton on the Falls Hotel

Hours of Operation are:

Tuesday 11:30 a.m. - 6:00 p.m.

Wednesday to Thursday 7:00 a.m. - 5:00 p.m.

Friday 7:00 a.m. - 4:00 p.m.

Conference Registration Fees (GST included)

	Member	Non-member
By February 27, 2009	$650.00	$925.00
After February 27, 2009	$755.00	$1030.00

Additional Fees (GST included)

Intro to Gift Planning-All in a Day!

Tuesday April 21, 2009 8:30 a.m. – 6:00 p.m.	Conference Attendees	Non-conference Attendees
Breakfast, lunch and reception included	$199.00	$250.00

Certified Senior Advisor (CSA®) Fast Start
Register at www.canadacsa.com

Tuesday April 21, 2009

7:30 a.m. – 4:45 p.m.

Breakfast, lunch and 2 coffee breaks included

Gift Planning for Professional Advisors - Half-Day*

Friday April 24, 2009	Member	Non-member
7:30 a.m. – 12:15 p.m.	$90.00	$125.00
Breakfast included		

** The Gift Planning for Professional Advisors session fee applies if you are only attending this session and not the full Conference*

CAGP-ACPDP™ Membership $299.00

Dinner and Show at the Skylon Tower $65.00

Friday April 24, 2009

Deadline to book is March 16, 2009

Full Conference registration includes:

- all plenary and workshop sessions
- the Friday Professional Advisors morning workshop sessions
- continental breakfast on Thursday and Friday lunch on Thursday and Friday
- the Opening Reception on Wednesday and the CAGP-ACPDP™ Banquet on Thursday
- pre- and post-Conference web access to all PowerPoint presentations (as released for inclusion)
- complimentary copy of *GEORGE'S TREE, The story of a well planned gift* written by Alain Lévesque, DeVimy Group Inc.

Payment

If paying by cheque, please courier or mail payment with completed registration and session form to:

CAGP-ACPDP™ National Office
325 Dalhousie Street, Suite 201, Ottawa, ON K1N 7G2

Please make your cheque payable to CAGP Niagara Falls 2009. Payment may also be made by Visa or MasterCard.

Cancellations

Cancellations must be received in writing and are subject to a $200.00 administration fee. **No refunds for cancellations received after March 16, 2009.** No shows forfeit the full registration fee.

Bursary Support

A limited number of bursaries are available to cover the cost of Conference registration. To receive a bursary application form and guidelines, visit our website at www.cagp-acpdp.org. Applications must be received by Friday, February 13, 2009.

Workshop Sessions and Toolbox Lunch Sign-Ups

All registered delegates must choose in advance the workshop sessions they would like to attend as well as the Toolbox Lunch topic they would like to discuss. Please complete the enclosed session sign-up forms with your choice of workshops and Toolbox topic. Workshop and Toolbox sessions are filled on a first come, first served basis. You may also sign-up online through our secure site www.cagp-acpdp.org.

Workshop rooms are set theatre style (chairs only) so bring something to write on if you like to take notes.

Accommodations

The Sheraton on the Falls is host to this year's Conference. The hotel provides a smoke-free environment for guests.

A special Conference rate of $165.00 for a traditional room and $185.00 for a Fallsview room (plus applicable taxes) per night single or double occupancy has been arranged for the Conference based on room availability at the time of booking. After March 16, 2009 the Conference room rate and hotel rooms are not guaranteed, so please book before the deadline.

To make your reservation, call the hotel directly and request the CAGP-ACPDP™ 2009 special Conference rate. Alternatively, fax the enclosed hotel registration form to the hotel or book your reservation online.

Sheraton on the Falls

5875 Falls Avenue
Niagara Falls, ON L2E 6W7

Telephone: 1-800-519-9911

Fax: 905-371-8349

Online Reservations:
www.starwoodmeeting.com/Book/GiftPlanners

Website: www.sheratononthefalls.com

Complimentary Accommodation Draw

If you book at the hotel by March 16, 2009, you will be entered in a draw to win a complimentary two night stay at the hotel in a traditional room. To be eligible for the prize, you must have booked and paid for a room at the Sheraton on the Falls during the CAGP-ACPDP™ Conference.

Conference Transportation

Visit the CAGP-ACPDP™ website at www.cagp-acpdp.org for information about train, air and bus service to Niagara Falls, driving directions and special airline and train discounts.

Delegate List

An electronic version of the delegate list will be sent to full Conference delegates prior to the Conference. Inclusion in the delegate list means that you consent to being contacted by the others on the list. If you wish to be excluded from the delegate list you may indicate that choice on the registration form.

Dress Code

Dress is business casual for the Conference. Thursday night's banquet is business attire.

Education Credits

The Conference workshops are eligible for education credits, including Advocis, CGA and CFRE. Other CE credits may be available. Contact the CAGP-ACPDP™ National Office by email at education@cagp-acpdp.org for further information.

Full participation at the Conference is applicable for 61.25 points in Category 1.B-Education of the CFRE International application for initial certification and/or recertification.

Exhibit Area

The hub of the Conference! Drop by and find out how the services and products of our exhibitors can help your organization be more productive. Refreshment breaks, draws, games and other entertainment will make the exhibit area a great place to network.

Internet Access and Business Centre

Internet access is available in all guest rooms and a full service business centre is open seven days a week.

Scent Free Meetings

CAGP-ACPDP™ recognizes that some people are sensitive to scented products. Perfumes and strong odours can precipitate severe asthma attacks. Please limit the use of perfumes, scented hair spray, cologne, aftershave and any other highly scented products out of respect for these individuals.

Simultaneous Interpretation

One workshop session room will be set up for simultaneous interpretation. The service is available for all sessions in this room.

Session Handouts and Speaker Presentations Online

Conference delegates can access speaker handouts prior to the Conference on the CAGP-ACPDP™ website. Details will follow.

In the interests of conserving paper, we are not providing printed copies of speaker handouts at the conference. Delegates may print handouts prior to the conference from the CAGP-ACPDP™ website and will be able to print handouts at the conference.

Special Requests

If you have any special dietary requests or special needs that should be considered, please indicate this information on the registration form. Additional fees may apply. Note: any special dietary needs that are communicated at the last minute (i.e. onsite) may not be accommodated.

Please note: speakers and program are subject to change.

Sponsorship and Exhibit Opportunities

The CAGP-ACPDP™ Conference is an excellent opportunity to showcase your products, services and programs; to network with key contacts in the charitable and professional advisor sectors and to learn more about the gift planning field in Canada.

For details about the Exhibit Area or sponsoring one of the many social and educational components, please contact the CAGP-ACPDP™ Conference Office at 1-866-296-5882.

Online Conference Information

For updated Conference information and a secure registration form, visit the CAGP-ACPDP™ website at www.cagp-acpdp.org.

Questions?

Contact the CAGP-ACPDP™ National Office at:

325 Dalhousie St., Ste. 201
Ottawa, ON K1N 7G2
Tel: 1-888-430-9494
Fax: 613-232-7286
Email: conference@cagp-acpdp.org
Website: www.cagp-acpdp.org

TUESDAY APRIL 21, 2009

7:30 A.M. – 4:45 P.M. • Certified Senior Advisor (CSA®)

This certification is suited to those working in the profession of gift planning. CAGP-ACPDP™ has teamed up with the Canadian Academy of Senior Advisors to offer you the opportunity to take the CSA Fast Track training option prior to the CAGP-ACPDP™ Conference. To find out more, visit www.canadacsa.com/fast_start.php to register for the one-day course.

8:00 A.M. - 6:00 P.M. • Intro to Gift Planning - All in a Day!

Join two experienced gift planners in an interactive session that examines the essentials of a clear and simple program. Key elements in your program like prospect identification, relationship building and the stewardship of donors will be discussed as well as a review of common gift planning vehicles used in implementing a program.

Brian D. Shea, Alberta Cancer Foundation;
Joshua E. Thorne, Hamilton Community Foundation

11:30 A.M. – 6:00 P.M. • Registration Open

12:00 – 10:00 P.M. • RoundTable Leaders Forum

The Leaders Forum is an opportunity for RoundTable Chairs or their representatives to get together to share ideas, discuss issues, plan for the year ahead, and learn more about the CAGP-ACPDP™ as an association. Registration with the National Office is required.

WEDNESDAY APRIL 22, 2009

7:00 A.M. • Registration Open

7:30 A.M. – 12:00 P.M. • LEAVE A LEGACY™ Chairs Forum

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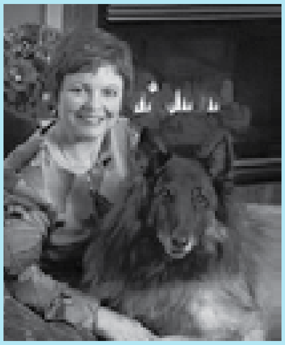
STRONGER COMMUNITIES TOGETHER™

The LEAVE A LEGACY™ Chairs Forum is designed to bring all our LEAVE A LEGACY™ leaders together in one room to share their findings, best practices and challenges. Those attending will also learn more about new National Office initiatives unfolding over the coming year. This session includes breakfast and is by invitation only. If you are a LEAVE A LEGACY™ Chair or RoundTable Chair and you have not received your invitation and would like to attend, please contact our National LEAVE A LEGACY™ Coordinator at 1-888-430-9494 ext. 3 or via email at leavealegacy@cagp-acpdp.org.

12:00-1:30 P.M. • Opening Plenary Session and Lunch

COMMUNICATION, TRUST AND CREDIBILITY



Elizabeth Grandbois

We all must find and maintain relationships - through trust, visibility, communication and product. At this session, Elizabeth will share the personal qualities that must be developed and maintained in these areas to secure that positive and successful end result. Filled with education, humor and inspiration!

1:30-3:00 P.M. • Workshop Sessions

★★ INTERMEDIATE — **PHILANTHROPIC TRENDS**

Using anecdotal examples and qualitative research, this session will provide insights on trends to watch in philanthropy and fundraising in Canada today. It will provide development professionals with an accurate picture of the current philanthropic landscape and the trends that they should be factoring into their fundraising strategies.

Karen Willson CFRE, KCI (Ketchum Canada Inc.)

★★ INTERMEDIATE — **SOCIAL CAPITAL & SOCIAL ENTREPRENEURSHIP**

Sponsored by: Jantzi Research Inc.

Explore the concepts of self-directed social capital and social entrepreneurship with one of Canada's top tax experts. Consider philanthropy from an investment perspective and learn how to use this approach with donors and clients. Look at these concepts from the entrepreneurial donor point of view. Tackle some creative donation strategic concepts, including securities, shares and prescribed annuities.

Tim Cestnick FCA, CPA, CFP, TEP, The WaterStreet Group Inc.

★★★ ADVANCED

CREATIVE DONATIONS OF REAL ESTATE

Donations of real estate have resulted in some of the largest and most beneficial gifts to charity. Establishing practical policies for gifts of real estate simplifies the task of dealing with donors, board members and advisors. You will hear real life, relevant stories of gifts of rental properties, vacant land, vacation properties, residual and life interest, international gifts and ecogifts.

Doug Puffer, Simon Fraser University

ALL

GIFT PLANNING OVERVIEW

Do you find that your day-to-day activities override your proactive and reactive gift planning activities? When a "charitable hint" or inquiry comes across your desk, do you feel rushed or stressed to relearn the basics? This workshop will provide an overview of the most common gifts; refresh your understanding of the essential tools and resources; and provide the confidence and passion you need to discuss gift planning with your donors and their professional advisors.

Christopher J.K. Richardson FCA, Charitable Gift Planning Consultant & Philanthropy Advisor

ALL

THE YEAR ON YOUR GOVERNMENT RELATIONS COMMITTEE

The panel will provide a detailed presentation on the new Fundraising Policy adopted by CRA; offer an opportunity to pose questions to panel experts and a CRA representative to clarify how the new policies apply; and review the current developments in the Charitable Remainder Trust proposal and the steps taken to regularize rules surrounding charitable gift annuities.

Panel Discussion – Moderator: Susan Manwaring LL.B., Miller Thomson LLP

3:00 – 3:45 P.M. • Refreshment Break in the Exhibit Area

3:45 - 5:00 P.M. • Plenary Session

Sponsored by:

Scotia Private Client Group

HOW THE WEALTHY GIVE AND WHAT YOU SHOULD KNOW ABOUT IT

Join us for this popular informal session as we gain a fresh perspective from the donors' point of view. Panelists will share their personal philanthropic experiences, sincere quips and sage advice for fundraising professionals and their views on how well we implement stewardship.

Moderator: Helen DeBoer-Daggett;

Panelists: Tim Cestnick FCA, CPA, CFP, TEP, The WaterStreet Group Inc.; John G. Walker, Walker Industries Holdings Ltd.

5:00 - 6:00 P.M. • Welcome Reception in the Exhibit Area

Enjoy a warm welcome to Niagara Falls and the 16th Annual National CAGP-ACPDP™ Conference. Meet and mingle with our exhibitors and sponsors while enjoying a taste of Niagara wines and local foods.

THURSDAY APRIL 23, 2009

7:00 A.M. • Registration Open

7:00 – 8:00 A.M. • CFRE Information Session

Join a representative from CFRE for this CFRE accreditation information session. For further information, contact the CAGP-ACPDP™ National Office at education@cagp-acpdp.org.

7:00 – 9:00 A.M. • Breakfast in the Exhibit Area

8:00 - 9:00 A.M. • Plenary Session

Sponsored by:

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MADE IN CANADA

Canadian gift planning practice has changed profoundly in the last ten years, but the theory is still rooted in the U.S. model. This provocative plenary will be part nationalist manifesto and part practical guide to the brave new world of gift planning in our country.

Malcolm D. Burrows CFRE, Scotia Private Client Group

9:00-10:30 A.M. • Workshop Sessions

★ INTRODUCTORY

MONITORING YOUR BEQUESTS - ESTATE ADMINISTRATION IN A NUTSHELL

This workshop will take you through the various steps in the bequest administration process with a particular focus on you as the charitable beneficiary. Common questions gift planners have will be answered in the context of examining the various stages of an estate administration including reviewing the estate accounting and administration process.

M. Jasmine Sweatman LL.B., TEP, LL.M., E.C., EPC, Sweatman Law Firm; David R. Windeyer M.T.I., T.E.P., David R. Windeyer Consulting Ltd.

★★ INTERMEDIATE

DEVELOPING A GIFT ACCEPTANCE POLICY

Sponsored by: Jantzi Research Inc.

This session will review how gift acceptance guidelines provide a charity with clarity on issues to discuss with donors, assist the charity in fulfilling its fiduciary duties in accepting and managing gifts, and managing donor expectations. Topics will include key issues in developing gift acceptance guidelines, key areas to include, and pitfalls to avoid in accepting gifts.

Theresa L.M. Man LL.B., Carters Professional Corporation

★★ INTERMEDIATE

SPEAKING THEIR LANGUAGE

Authentic conversations with donors and prospects have become the cornerstone of successful organizations. So how do you connect with people who are older or younger than you or have had vastly different life and cultural experiences? Come explore with us the intergenerational and multigenerational art of conversation.

Tracey Bailey CFRE, KCI (Ketchum Canada Inc.)

★★ INTERMEDIATE

MAINTAINING DONOR CONFIDENCE DURING TURBULENT TIMES

Maintaining donor trust and confidence requires sound investment practices, transparency, the ability to communicate effectively and to display your fiscal responsibility as an organization. Donors are making an investment in your charity and require assurance to support their decisions. Participants will learn various tools, tips and examples to ensure donor trust and confidence are maintained.

Rowena Griffiths, Carleton University; Jack Jamieson, T.E. Investment Counsel Inc.

★★ INTERMEDIATE

BRIDGING THE CHASM BETWEEN MAJOR AND PLANNED GIVING

The past ten years has seen a tremendous increase in personal wealth. Learn how location, lifestyle and family help to shape the overall philanthropic decision-making process. Learn to engage in meaningful discussions with potential donors and bridge the chasm between major and planned giving discussions.

William Petruck, FUNDING matters Inc.

★★ INTERMEDIATE

MENTAL CAPACITY AND INCAPACITY: WHAT THE GIFT PLANNER SHOULD KNOW

A charity may find itself as a defendant in a law suit where family members are challenging a gift to the charity by questioning the mental capacity of the donor relative. We will explore testamentary capacity in the context of Will challenges and challenges to inter vivo gifts and discuss how the gift planner can protect the gift.

Rachel Blumenfeld LL.B. and Michael W. Kerr LL.B., Miller Thomson LLP

10:30 - 11:15 a.m. Refreshment Break in the Exhibit Area

11:15 a.m. -12:15 p.m. Workshop Sessions

★ INTRODUCTORY

MAKING UNDERSTANDING TAX FUN!

To be a successful gift planner you must develop an understanding of the tax side in order to work effectively with financial advisors and to clarify gift concepts for the public. This interactive session will leave you with a better appreciation of what you need to know to talk tax!

DeWayne Osborn CGA, CFP, Lawton Partners Financial Planning Services Limited

★★ INTERMEDIATE

THE FAMILY BUSINESS OF PHILANTHROPY

This session will center on a case study of an entrepreneurial family whose children have grown and their businesses have achieved success. They want more out of life and are looking for that special thing to fill that upcoming void in their life. Could philanthropy provide the answer?

C. Yvonne Chenier LL.B., MBA and Cindy Radu LL.B., FCA, CIDEL Trust Company

★★ INTERMEDIATE

JUSTIFY YOUR EXISTENCE: REPORTING TO THE BOARD

You are steadily working to build a solid planned giving program but your Board is impatient for immediate cash results! Learn how to track and report your activities so that the Board will understand the process and will leap for joy right along with you when those transformational gifts finally make an appearance.

Carla Funk and Tim Maloney, The Land Conservancy of British Columbia

★★ INTERMEDIATE

DONOR RIGHTS AND REMEDIES: WHAT GIFT PLANNERS NEED TO KNOW

This presentation will raise awareness of the obligations that organizations have towards donors and members, describe the potential rights and remedies such donors and members have, and discuss some of the complex issues that can arise in this regard.

Laura West LL.B., Fasken Martineau DuMoulin LLP

★★ INTERMEDIATE

GIFTS OF SECURITIES - A THING OF THE PAST?

Sponsored by: Jantzi Research Inc.

Gifts of securities are and will continue to be an important part of our gift planning environment. This session will look at opportunities and/or issues surrounding publicly listed securities, and others such as mutual funds, exchangeable shares, and flow-through shares. The power of such gifts is harnessed if you are ready to receive said gifts.

Geoffrey Berry and Michelle M.B. Osborne CFRE, University of Toronto

★★★ ADVANCED

INTEGRATING WILL, ESTATE AND CHARITABLE PLANNING

This session will discuss the integration of charitable planning in the will and estate planning process from the perspective of professional advisors. The session will address such issues as current, short-term and long-term planning goals and needs; maximizing personal goals with practical needs; and the various planning options/strategies available.

Elaine Blades LL.B., TEP, MTI and Sophia E. Dunkley LL.B., Scotia Private Client Group

12:15 - 2:00 p.m. CAGP-ACPDP™ AGM and Toolbox Lunch

This is your opportunity to hear from the CAGP-ACPDP™ Board and the Executive Director about new developments with the Association. Follow this up with an informal box lunch while you share ideas, perspectives, news and views with like-minded colleagues on a variety of planned giving topics. Be sure to sign up for your preferred topic when you register for your workshop sessions. Tables will fill up quickly!

2:00-3:00 p.m. Workshop Sessions

★★ INTERMEDIATE

GIFT PLANNING IN TURBULENT TIMES

"It was the best of times; it was the worst of times" wrote Charles Dickens in *A Tale of Two Cities*. While these are not the worst of times for charitable giving, they are far from ideal, given current economic conditions. This session will discuss strategies for charities when markets are turbulent and donors are anxious, noting in particular the types of gifts that should be emphasized at this time.

Frank Minton, PG Calc Incorporated

★★ INTERMEDIATE

BUILDING A VIABLE AND EFFECTIVE PLANNED GIVING PROGRAM

West Park Healthcare Centre Foundation's Planned Giving Program evolved from a grass roots level to a highly structured, strategic model. It is designed to build relationships while educating planned giving prospects about a variety of planned giving vehicles and their benefits. It augments the Foundation's major and annual giving programs, allowing for a continuum of lifetime giving. Learn how West Park has implemented and promotes its Rainbow Legacies Planned Giving Program.

Betty Franklin RN, West Park Healthcare Centre

★★ INTERMEDIATE

ESSENTIAL CHARITY LAW UPDATE: WHAT EVERY GIFT PLANNER NEEDS TO KNOW

This session will provide a practical overview of the essential highlights in charity law over the past year that every gift planner needs to know. Recent changes to the *Income Tax Act*, rulings, interpretations, policies and publications issued by CRA and other federal and provincial legislative initiatives that affect charities will be reviewed. The session will also include an overview of recent case law and its impact on charities and gift planning.

Terrance S. Carter LL.B. and Karen J. Cooper LL.B., Carters Professional Corporation

★★ INTERMEDIATE

WORKING WITH HIGH-LEVEL VOLUNTEERS

A dialogue that is truly consensual in establishing goals makes for dynamic, successful teams of fundraisers and volunteers. In this session, we will talk about key issues and ways of communicating with volunteers, about creating a clear vision of success, and about giving volunteers the confidence to build rewarding relationships with donors.

Colleen J. Cowman Ph.D., PEN Canada; Mary Jane Wood, Distress Centres of Toronto

★★ INTERMEDIATE

DONOR CASE STUDIES: DESIGNING CHARITABLE GIFTS TO MEET THE NEEDS OF YOUR DONOR

The key to designing practical gift options for donors is to listen to what they tell you. This session will take principles of gift planning, elements of relationship building and use donor stories to illustrate how each can be utilized to design a planned gift suited to a donor's individual needs and circumstances.

Speaker to be confirmed

ALL

TO BEQUEST OR NOT TO BEQUEST: THAT IS THE QUESTION

Gift planners need to feel grounded in the way they approach people about bequests and be focussed on the goal of the ultimate gift. Doug will share his ideas for building relationships, developing trust with donors and advisors, discovering and understanding donor's values, and stewardship of known and unknown donors. We will talk about the charitable bequest and have a little fun with Shakespeare.

Doug Puffer, Simon Fraser University

3:00 - 3:45 p.m. Refreshment Break in the Exhibit Area

3:45-4:45 p.m. Workshop Sessions

★ INTRODUCTORY

TIPS, TEMPLATES, SAMPLES & EXAMPLES

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

★★ INTERMEDIATE

ENDOWING CHARITABLE DONATIONS PART II (OR HOW TO DOCUMENT ENDOWMENTS)

In this session, we will discuss how to document an endowment and review, in detail, three different standard-form agreements. You will learn when to use each of these agreements and the key terms that should be included in each one.

Kate Bake-Paterson, Davis LLP

★★ INTERMEDIATE

THE ULTIMATE GIFT OF CITIZEN KANE

Based on the life of Citizen Kane, the famous character in Orson Welles' film masterpiece, this presentation will draw parallels between the phases in one's life and the development of one's philanthropic profile: from the first act of generosity to the annual donation, the major gift and the ultimate planned gift. The film analogy will help us develop our observation skills and to know better and assist donors in considering an ultimate gift.

Chantal Thomas MBA, Université de Montréal

★★ INTERMEDIATE

GIFT PLANNING: THE HEART OF A SUCCESSFUL CAMPAIGN

In this workshop you will learn how organizations in Canada can revolutionize their campaigns by embracing the fact that gift planning is the heart of a healthy campaign strategy - how we plan, market, recognize and count planned gifts is absolutely vital to the long term success of any campaign.

Trevor M. Clark CFRE, Queen's University;
Julie Wirtanen CFRE, Crossroads Consulting

★★★ ADVANCED

GIFTS OF INSURANCE

This session will include a discussion on how to approach donors with life insurance strategies and the kinds of life insurance to accept or not accept; a review of the new rules of evaluation for the market value of an existing policy; and how to set up a split-ownership contract.

Alain Lévesque, DeVimy Group

ALL

POSITIVE NETWORKING: PRACTICAL PROGRAM BENEFITS

As gift planners and professional advisors we often find ourselves in a variety of intense networking situations. Take the pressure off with the anti-shmooze philosophy of win-win positive networking. Learn practical skills to be more effective in personal, professional and social networking situations. Gain information on how to quantify networking activity and justify the time invested.

Paul C. Nazareth, Roman Catholic Archdiocese of Toronto

6:00 p.m. CAGP-ACPDP™ Reception and Banquet

GORD PAYNTER - LEAVE 'EM LAFFIN

Join us for dinner and laughs as Gord Paynter, a comic with a twist, entertains and leaves you laughing for more. Losing his eyesight in his early twenties as a result of diabetes, Gord thought his lifelong dream of becoming a comedian was gone forever. In truth, blindness opened his eyes to a whole new world of opportunity, humour and motivation. Gord has been featured at the international comedy festival Just For Laughs in Montreal, the Winnipeg Comedy Festival, the Halifax Comedy Festival, Club 54, and CBC's Fifth Estate and The Nature Of Things With David Suzuki.

FRIDAY APRIL 24, 2009

Day Sponsor: Investors Group

Professional Advisors Half-Day Sponsor:

Mackenzie INVESTMENTS

7:00 a.m. Registration Open

7:00 - 9:00 a.m. Breakfast in the Exhibit Area

8:00-9:00 a.m. Plenary Session

Sponsored by:

CARTERS.ca

FASKEN MARTINEAU Beyond results.™

CHARITIES AND THE FINANCIAL SERVICES INDUSTRY – ARE WE EXPECTING TOO MUCH?

The Canadian financial services industry is becoming increasingly involved with the charitable sector. New foundations are springing up, and optimistic forecasts have been made about donor activity and the opportunity that such activity will create for advisors, fund companies, insurers and investment managers. This session will examine recent trends and suggest that, in the light of recent economic events, some forecasts may be optimistic.

Keith H. Sjögren, Investor Economics

9:00-10:30 a.m. Workshop Sessions

★ INTRODUCTORY

LEADING TO THE RIGHT ASK: BUILDING RELATIONSHIPS THROUGH STORY LISTENING

This session provides a way to build relationships with both existing donors and prospects through story listening. You will learn the value of story telling and listening to make a match in a comprehensive campaign and build effective relationships that lead to meaningful gifts for both the donor and the charity.

Diana Deakin-Thomas, YMCA of Greater Toronto

★★ INTERMEDIATE

CREATING A PROACTIVE STEWARDSHIP PROGRAM

Sponsored by: Jantzi Research Inc.

In today's competitive fundraising environment, proactive stewardship of our donors and their gifts cannot be overstated. This topic will be presented on the basis of a donor/client centered approach to working with organizations to establish and/or enhance their stewardship donor programs and the stewardship of gifts through effective investment management practices.

Joan Blight, Strategic Philanthropy; Ann E. Jackson CFA, MBA, Phillips, Hager & North Investment Management Ltd.

★★★ ADVANCED

PERSPECTIVES ON THE CHARITY AS EXECUTOR AND ESTATE TRUSTEE

Participants will learn the legal framework surrounding the role of executor and estate trustee and panelists will share their experience acting as executor and estate trustee of a donor's estate. Highlights will include choosing who in your organization should act, choosing when and when not to act, and setting policies in this regard.

Patrick Corlett CFA, Salvation Army; Jo-Anne Ryan PFP, TD Waterhouse Canada; Amanda Stacey LL.B., Miller Thomson LLP

ALL

INVESTMENT MANAGEMENT FOR MEDIUM OR SMALLER-SIZED SHOPS

Investment management? That's the CFO's responsibility! But gift planners must understand the issues related to investment management - governance, investment goals, clear manager mandates, legal parameters and disbursement requirements - for prudent donor stewardship and sound financial management. This session will provide the skills and tools you need to understand your organization's investment management.

Cathy Mann CFRE, Cathy Mann & Associates; S. Kelly Rodgers CFA, Rodgers Investment Consulting

ALL

PROFESSIONAL ADVISORS PANEL

This session will present successful models of relationships that are working between charities and advisors. It will discuss challenges faced by both and propose ways these two worlds can work better together given the differences in their goals and definition of success.

Moderator: Brad Offman, Mackenzie Investments

10:30 - 11:15 a.m. Refreshment Break in the Exhibit Hall

LAST CHANCE TO VISIT THE EXHIBITORS

11:15 a.m.-12:15 p.m. Workshop Sessions

★ INTRODUCTORY

LIFE INSURANCE: JEERS & CHEERS

We've "cheered" the creation of insurance gifts and we've lived through the "jeers" of ones that have gone awry. What happened? Learn why an audit and an annual review are necessary. How does the recent legislation change things? Find out how these insights may dictate changes to your gift acceptance policy.

Deborah Bauder CFRE and Sarah Rothwell CFRE, North York General Hospital Foundation; C. Michele Wilson FLMI, CFP, CLU, CH.F.C.,FMA, Ross M. Durant Insurance Agency

★ ★ INTERMEDIATE

EVERYTHING YOU ALWAYS WANTED TO KNOW ABOUT STICKY QUESTIONS

Have you ever been faced with a tough ethical dilemma in your gift planning career? This session will provide participants with a forum to discuss a range of common difficult donor situations. Come with your own questions and problems, learn, laugh, and trade ideas on how to manage tough situations.

Mary McPherson CFRE and Ann Rosenfield CFRE, CNIB

★ ★ INTERMEDIATE

BUILDING A NETWORK THAT WORKS - ADVISORS AND YOUR GIFT PLANNING PROGRAM

Learn how to engage accountants, financial advisors, lawyers and other professionals with your charitable organization's gift planning program. Explore how a hospital foundation successfully built a network of advisors. This Council has proven beneficial not only for the foundation but also for the donors, staff, volunteers and greater community.

Nancy Brewer FCA, Chartered Accountant, Professional Corporation;
Nancy Handrigan, Joseph Brant Memorial Hospital Foundation

★ ★ INTERMEDIATE

CONGREGATION AS CRUCIBLE

Alchemists sought to transmute base metals into gold by combining ingredients in a crucible and applying heat. For gift planners in faith-based organizations, the congregation is the crucible in which much of their work happens. Understanding the ingredients and the vessel will help us to find the gold that is there.

Herb Gale M.Th, The Presbyterian Church in Canada

★ ★ ★ ADVANCED

THE PERFECT BLENDSHIP: INTEGRATING MAJOR GIFTS AND PLANNED GIVING

Beginning with statistical data and trends on planned giving and major giving, the session will explain different staffing models. The concept of the commonality of "money" will be explored in depth as will the story of one organization's successful attempt to do excellent major gifts and planned giving fundraising.

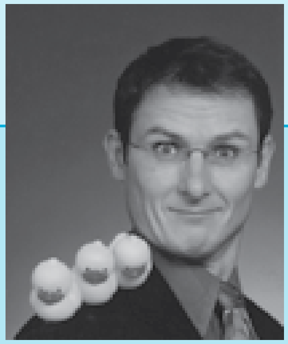
Robert Ryan, Grenzebach Glier + Associates

12:15 - 1:30 p.m. Plenary Session

Sponsored by:

PHILLIPS, HAGER & NORTH
Investment Management Ltd.

THE ULTIMATE ENDING



Storyteller extraordinaire, Paul presents a hilarious outsiders look at the CAGP-ACPDP™ Conference. Laugh at his on-the-spot musical comedy written for and about us. Paul makes memorable everything you will want to remember.

Paul Huschilt, CSP

DAY SPONSOR: Investors Group™

1:30 - 2:30 p.m. Workshop Sessions

★ INTRODUCTORY

SUCCESS IS IN THE NUMBERS REPORT ON YOUR PROGRAM

In this session, you will learn how to report your program's activity to attract positive attention; secure additional resources; and strategically plan for growth. Learn practical benchmarking regardless of which database you use. Understand how to present trends, current dollars raised and future dollars raised. Reports discussed will include board reports, program reports, benchmarking and program projections, individual and program goals, and individual fundraising activity reports. Report templates will be available.

Saskia Ages CFRE, Victoria Hospice Foundation

★★ INTERMEDIATE

THE SEVEN GIVING PERSONALITIES: UNDERSTANDING YOUR CLIENT/DONOR

This session will help you to understand your donors as clients; deepen your client relationships by understanding their values; discover the seven giving personalities, their various motivations, and how to relate to each; recommend donations strategies that meet client personalities, values, financial situation and goals.

Elaine R. Kelly MBA, CFP, FMA, Meridian Credit Union

★★ INTERMEDIATE

UNDERSTANDING PRIVATE FOUNDATIONS AS A GIFT PLANNING TOOL

This presentation will review the tax and non tax considerations that a donor will confront when trying to decide to set up a private foundation or make a gift to a community or public charity, including the role of donor advised funds. The different rules that apply to each category of charity will also be reviewed as an important element in a donor's decision and a gift planner's discussion with prospective donors.

M. Elena Hoffstein LL.B., Fasken Martineau DuMoulin LLP

★★★ ADVANCED

RELATIONSHIP BUILDING: EARNING YOUR PLACE ON MULTIDISCIPLINARY WEALTH MANAGEMENT TEAMS

Sponsored by: Jantzi Research Inc.

The focus of this session will be on working with multidisciplinary teams of financial professionals and their clients, building long-term relationships, and adding value to the intergenerational wealth planning process. A series of case studies, including cautionary tales, will be followed by a structured open discussion.

Susan Latremoille, Richardson Partners Financial Limited

★★★ ADVANCED

INTEGRATING MAJOR AND PLANNED GIVING

Using theory, examples, and participant interaction, the presenters will share how they integrate the major and planned giving functions at The Princess Margaret Hospital Foundation to maximize revenue. This optimal use of staff resources ensures the organization doesn't leave money on the table and results in donors whose philanthropic dreams are fulfilled.

Sherri Freedman, Greg Lichti CFRE and Jill Nelson CFRE, The Princess Margaret Hospital Foundation

2:30 – 3:00 p.m. Refreshment Break

3:00-4:00 p.m. Closing Plenary Session

THE TEN BEST PRACTICES OF PASSIONATE PHILANTHROPY

Passionate Philanthropy brings us back to why we chose this profession in the first place. You'll discover ten practical ways you can harness the power of passion, enthusiasm and excitement in your professional practice.

Fraser Green CFRE, FLA Group

6:00 pm. Dinner & Show at the Skylon Tower Optional Social Activity hosted by Niagara/Golden Horseshoe RoundTable

What would a trip to Niagara Falls be without a visit to the world-famous Skylon Tower? Step into a glass-enclosed, exterior elevator for a 52 second Ride-to-the-Top where you can take in spectacular views of Niagara Falls, the Great Gorge, the Niagara wine district and the Toronto skyline. At the top, experience the 3D/4D movie "Legends of the Falls" that takes you back in time to the geological evolution of the Great Lakes, the Niagara River and the mighty Niagara Falls.

Then enjoy a buffet dinner 775 feet above the Falls!

Price: $65.00 (GST and transportation included)

Seating is limited. Deadline to purchase tickets is March 16, 2009.

Saskia Ages CFRE

Saskia Ages is Executive Director of Victoria Hospice Foundation and winner for Outstanding Development Program from AHP Canada in 2006. Also Director with Planned Giving Canada, Ms. Ages has 15 years of planned giving experience. She is currently a member of the AHP Canada Cabinet and a former Planned Giving Instructor with the BC Institute of Technology.

Tracey Bailey CFRE

Tracey Bailey, Vice President at KCI, has over 20 years experience in fundraising and communications. Ms. Bailey has worked on a number of highly successful campaigns, including a $350 million campaign for the University of Waterloo, and goal-breaking campaigns for the University of Guelph and Bloorview Kids Rehab. She was Campaign Communications Officer on McMaster University's Changing Tomorrow Today Campaign.

Kate Bake-Paterson LL.B.

Kate Bake-Paterson has been a lawyer at Davis LLP since 2004 and is a member of the Wills, Estates and Trusts and Charities and Not-for-Profit Organizations Practice Groups. She advises charities on various issues relating to their endowments as well as more generally on matters of corporate governance and other legal issues that arise in the day-to-day operations of charities.

Deborah Bauder CFRE

Deborah has fundraised for grassroots, national and hospital organizations for over 17 years. She is the Advancement Officer at North York General Hospital where she works with Major and Planned Giving donors. Deborah believes she is the Queen of "wonky wills" and now proudly claims victory over some equally "wonky life insurance." She is also the Chair of the CAGP-ACPDP™ Greater Toronto Area RoundTable.

Geoffrey Berry

Geoff Berry is Estates & Securities Officer at the University of Toronto. He is the University's primary administrative contact regarding realized planned gifts for the University. Before the University of Toronto, he was employed at TD Waterhouse administering and closing estate files within their Registered Plans department. Geoff is currently working to complete his certificate in Risk Management at the University of Toronto.

Elaine Blades LL.B., TEP, MTI

Elaine has worked in the trust industry since 1992 in a variety of roles. She is currently responsible for Estate & Trust product development, positioning and training with Scotia Private Client Group. In addition, Elaine works with high net worth clients to assist them in developing comprehensive estate plans.

Joan Blight

Joan Blight, Strategic Philanthropy's Senior Consultant, has over 30 years experience in the voluntary sector. Strategic Philanthropy specializes in planning, fund development and special projects for non-profit organizations; philanthropic planning services for families and offers LegacyPro, a program for professional advisors, to assist them in their work with their clients regarding charitable planning.

Rachel Blumenfeld LL.B.

Rachel is a partner at Miller Thomson LLP, practicing in the areas of trusts and estates, tax law, and charities and not-for-profit law. Rachel is often called upon to advise clients on tax and estate planning and estate administration, tax matters related to planned giving as well as business succession planning. She also offers advice to charities and trustees on the administration of estates and trusts. She is a frequent presenter on planned giving, bequest administration, succession planning and tax matters.

Nancy Brewer FCA

Nancy Brewer, a chartered accountant, was honoured as a Fellow of the Institute of Chartered Accountants of Ontario (ICAO) in 2003. She has held positions with an international accounting firm, the corporate world and the ICAO. Nancy is a founding member of Joseph Brant Memorial Hospital Foundation's Gift Planning Advisory Council.

Malcolm D. Burrows CFRE

Malcolm leads philanthropic advisory services at the Scotia Private Client Group. He is past-chair of the CAGP-ACPDP™ Government Relations Committee, Course Director of CAGP-ACPDP™ courses and a "Friend of CAGP-ACPDP™."

Terrance S. Carter LL.B.

Terrance Carter is Managing Partner of Carters Professional Corporation. Mr. Carter practices in the area of charity and not-for-profit law, and is counsel to Fasken Martineau DuMoulin LLP. Mr. Carter is a member of Canada Revenue Agency's Technical Issues Group, past member of CRA's Charity Advisory Committee, past Chair of the National Charity and Not-for-Profit Section of the Canadian Bar Association, and is recognized as a leading expert in Canada by *Lexpert* and *Best Lawyers in Canada*. Mr. Carter is also a frequent writer, editor and speaker in the area of charity and not-for-profit law across Canada and internationally.

Tim Cestnick FCA, CPA, CFP, TEP

Tim is one of Canada's most recognized tax experts and co-founder of WaterStreet Family Wealth Counsel. Previously, he was a senior executive with one of Canada's largest privately owned investment counsel firms; founder and President of a tax consulting and education firm; Tax Partner at accounting firm Bateman MacKay; and Tax Specialist at international accounting firm Deloitte. Tim is a Fellow of the Institute of Chartered Accountants, a tax columnist for the *Globe & Mail*, has written several Canadian bestsellers, and appears regularly on national television and radio.

C. Yvonne Chenier LL.B., MBA

Yvonne Chenier is Trust Counsel at Cidel Trust Company in Alberta. She previously had her own private practice and worked as a financial consultant and advisor to high net worth and not-for-profit clients of a large Canadian financial institution. She has served as a board member or founder of numerous not-for-profit organizations and is currently Alberta Chair of the Charities section and a member of the National Executive of the Charities and Not-For-Profit Section of the Canadian Bar Association.

Peter Chipman BBA, CFRE

Peter Chipman is Director of Planned Giving/Major Gifts for Variety – The Children's Charity of BC that raises about nine million dollars annually for BC's special needs kids. He has researched, assessed and implemented a successful planned giving program that raises on average $1 million per year. The program uses the database, donor research, tracking, relationship building and stewardship to generate donor loyalty and gifts.

Trevor M. Clark CFRE

Trevor Clark worked in the Canada and Bermuda Territory for 16 years with the Salvation Army including four years as the Territorial Director of Corps Planned Giving. Trevor has also worked at two hospital foundations including the SickKids Foundation in Toronto. He currently serves as Director of Development for Planned Giving at Queen's University.

Karen J. Cooper LL.B.

Karen is a partner of Carters Professional Corporation and practices charity and not-for-profit law with an emphasis on tax issues from the Ottawa office. She was a Senior Rulings Officer with the Income Tax Rulings Directorate of Canada Revenue Agency, and a former counsel for the Department of Justice in tax litigation. She has considerable teaching experience and is a contributing author to *The Management of Charitable and Not-for-Profit Organizations Canada* (LexisNexisButterworths).

Patrick Corlett CFA

Patrick is Director of Estates and Associate Legal Counsel for The Salvation Army in Canada. He has been Director of Estates for The Army since 1995. The Salvation Army receives approximately 700 new estates per year in Canada. Patrick is also a Chartered Financial Analyst (CFA), and a former Salvation Army Officer (pastor).

Colleen J. Cowman Ph.D.

Colleen Cowman is Director of Development, PEN Canada. Previously with McGill, McMaster, and the Canadian Merit Scholarship Foundation as Executive Director, she has consulted for several North American scholarships. Colleen has a Ph.D. (York). She volunteers with the Excellence Awards, Planning4Success, Canadian Warplane Heritage Museum, Top 20 Under 20 and is a mentor with the CAGP-ACPDP™ GTA Roundtable mentoring program.

Diana Deakin-Thomas

Diana has been with the YMCA for many years in Canada and the U.S. She is a member of CAGP-ACPDP™ and the Greater Toronto Area RoundTable. Diana is a sought after presenter throughout the YMCA. She presents on a number of topics but has the most fun presenting notions around relationship development.

Helen DeBoer-Daggett

Helen DeBoer-Daggett has over 10 years fundraising experience and 25 years of business management. She has gained respect for her passion for Legacy Giving and serves as the Director of Development at Norfolk General Hospital Foundation. Helen was the former Director of Legacy Giving with Hamilton Health Sciences Foundation and she speaks nationally as an active member with CAGP-ACPDP™.

Sophia E. Dunkley LL.B.

As Manager, Philanthropic Advisory Services at Scotia Private Client Group, Sophia works with clients and their advisors to develop customized charitable giving solutions, ranging from bequests and gifts of life insurance to advised funds and private foundations, which are both efficient and flexible. She has a background in charities and not-for-profit law and planned giving.

Betty Franklin RN

Betty Franklin has a long history in the healthcare sector and worked as a front-line Registered Nurse for many years. She transitioned into fundraising in 2000 and has worked with the Canadian College of Naturopathic Medicine, Hospice Simcoe and as a consultant. She has been an active member of the Planned Giving Counsel of Simcoe County and the Barrie Community Foundation. Presently she works with Major and Planned Gifts at West Park Healthcare Centre Foundation.

Sherri Freedman

Sherri Freedman has been in the fundraising field for the past 20 years. She began her career at United Way of Greater Toronto and subsequently spent four years at the Mount Sinai Hospital Foundation. She is currently the Vice President, Development for The Princess Margaret Hospital Foundation where she oversees Major Gifts and Planned Giving.

Carla Funk

Carla Funk is Manager of Donor Relations, The Land Conservancy of BC (TLC) and Chair of the CAGP-ACPDP™ Vancouver Island RoundTable. For six years Carla has developed and managed the Province-wide planned giving program of TLC in Victoria, BC. Prior to this she lived and worked in Europe and Africa before returning to Canada with her husband to raise their three sons. She holds an MScAg in Plant Genetics from University of Manitoba.

Herb Gale M.Th

Herb Gale is an ordained minister with an M.Th in the area of spirituality and twenty-four years of experience serving congregations. As the director of Planned Giving for the The Presbyterian Church in Canada since 2004, he seeks to help individuals and congregations make the connection between faith and money issues.

Elizabeth Grandbois

In 1997, Elizabeth was diagnosed with ALS. Since then, she has worked tirelessly to raise the profile of ALS and to ensure it a place of equality for research dollars and government funding. She is a published author, the subject of numerous documentaries, and an educator through her public speaking engagements and media interviews.

Fraser Green CFRE

Fraser Green is a Principal at FLA Group, a consulting firm that specializes in direct marketing, donor research and legacy marketing. Fraser is the co-author of *Iceberg Philanthropy* and was the 2007 Ottawa AFP Fundraising Executive of the Year. Fraser has spoken at major fundraising conferences in Canada, the U.S. and Europe.

Rowena Griffiths

Rowena Griffiths is Director, Personal and Planned Giving at Carleton University. Rowena has over 20 years of fundraising experience ranging from major and planned gifts to cause marketing. She enjoys focusing on cultivating long-term donor relationships. Rowena is a faculty member of CAGP-ACPDP™ and a board member of the Ottawa Estate Planning Council.

Nancy Handrigan

Nancy Handrigan is Manager of Estate & Gift Planning at Joseph Brant Memorial Hospital Foundation. A fundraiser for the past decade, Nancy thoroughly enjoys building relationships with both donors and advisors to further the Foundation's gift planning program.

M. Elena Hoffstein LL.B.

lena Hoffstein is director of the Toronto office's Wealth Management and Charities practice group at Fasken Martineau DuMoulin LLP. She is engaged in personal tax and estate planning, family business succession planning, wills and trusts, corporate reorganizations, marriage contracts and charities and not for profit law. Elena has been ranked by *Lexpert* as one of the most frequently recommended Toronto private client and charity law practitioners and as one of the top 500 lawyers in Canada.

Paul Huschilt CSP

Paul Huschilt is a unique and sought-after professional speaker, storyteller, and trainer. He has a Master of Arts Management Degree from Carnegie Mellon University, a Bachelor of Fine Arts in Acting from the University of Windsor, a Diploma in Career Counselling from George Brown College, and a Certificate in Adult Education from St. Francis Xavier University.

Ann E. Jackson CFA, MBA

Ann is responsible for portfolio management for charitable organizations, endowments, foundations and other non-profit clients at Phillips, Hager & North. She is a member of the Association for Healthcare Philanthropy and CAGP-ACPDP™. Ann sits on the Board of a Toronto hospital foundation and in that capacity sits on foundation and hospital committees.

Jack Jamieson PFP

Jack is Vice President of T.E. Investment Counsel Inc. and has over 30 years of experience in the investment and financial services industry. He has worked extensively in the charitable sector to assist in the creation of efficient and cost effective investment solutions. Such involvement includes governance and oversight, investment policy development, the manager search & selection process as well as ongoing performance measurement and advisement.

Elaine R. Kelly MBA, CFP, FMA

Elaine brings a business degree, industry designations and 18 years of experience to her role as Financial Planner with Meridian Credit Union. She Co-chaired Meridian's United Way Employee Campaign, is Treasurer of her school's Parent Council, and authored *Give Smart: How to make a dramatic difference with your donation dollar.*

Michael W. Kerr LL.B.

Michael Kerr is a partner at Miller Thomson LLP practicing primarily in the area of civil litigation, with a special emphasis on estates law. Michael has acted as counsel in a wide range of disputes at all levels of courts in Ontario. Michael is a former instructor at Osgoode Hall's Trial Advocacy Program.

Susan Latremoille

Susan Latremoille is Wealth Advisor and First Vice President of Richardson Partners Financial Limited. Susan brings 20 years experience and a comprehensive approach to the management of the affairs of wealthy intergenerational families. A committed philanthropist, she is a Sick Kids Legacy Advisor and speaker. She is the author of *The Rich Life: Managing Wealth and Purpose.*

Alain Lévesque

Alain has been in the financial services sector for 12 years. He worked in investments at Midland Walwyn & Merrill Lynch, and then turned to life insurance at Force Financière Excel. In 2006, Alain started his own financial services firm DeVimy Group. For the past four years, he has been fully dedicated to gift planning and presents at conferences on a regular basis. He is the author of *George's Tree, The Story of a Well Planned Gift.*

Greg Lichti CFRE

Greg Lichti is Senior Director, Major Gifts at The Princess Margaret Hospital Foundation in Toronto. Greg and his colleagues are responsible for raising over $28M annually in major gifts to support world-leading cancer research. Greg graduated from the CAGP-ACPDP™'s planned giving course, was Co-Chair of the 2004 CAGP-ACPDP™ national conference and is Chair of CAGP-ACPDP™'s national board.

Tim Maloney

Tim Maloney is Director of Advancement, The Land Conservancy of BC (TLC). On his journey here he's been a Salesman, Caseworker, Farmer, Executive Director, VP Communications, CEO, COO, Consultant, as well as Father, Husband, Volunteer, Catechism Teacher. Throughout the journey he tried to have hope, take risks and seek harmony.

Theresa L.M. Man LL.B.

Theresa Man is a partner in Carters Professional Corporation. She practices in the area of charity and not-for-profit law, with particular emphasis regarding tax issues. Ms. Man is on the executive of the Charity and Not-for-Profit Section of both the Ontario and the Canadian Bar Associations, is a member of the Canadian Tax Foundation, and has been actively involved with numerous charities. She has been a speaker at various seminars and written on charity and taxation issues for various publications.

Cathy Mann CFRE

As Principal of Cathy Mann & Associates, Cathy brings her humour and creativity combined with systems thinking to all of her projects. While Executive Director of Frontier College Foundation, the Foundation won the 2007 Award for Excellence in Fundraising for Small Shops from the Association of Fundraising Professionals. She is a frequent speaker and teaches at Ryerson University's Fundraising Management program.

Susan Manwaring LL.B.

Susan is a partner at Miller Thomson LLP, Toronto. Susan works with charities and non-profit organizations directly dealing with all aspects of their affairs. Susan is regularly called upon to advise charities and non-profits on compliance and other issues arising under the Income Tax Act(Canada) as well as under provincial regulation. Susan frequently writes and presents to the voluntary sector on tax, corporate, governance and other regulatory issues. Susan was recognized in 2008 by *Lexpert* as a leader in Canadian Charities/Not-for-Profit Law Practitioner, is Past Chair of the Miller Thomson Charities and Not-for-Profit Industry Group, Chair, CAGP-ACPDP™ Government Relations Committee and Chair of the Executive of the Canadian Bar Association Charities and Not-for-Profit Section.

Mary McPherson CFRE

Mary is Director of Development for Ontario at the CNIB. A fundraiser since 1996, Mary started her career at the United Way of Peel Region. She has worked with Kids Help Phone and The Credit Valley Hospital in Mississauga where she successfully completed a $52M capital campaign.

Frank Minton

Frank Minton is Senior Advisor at PG Calc and previously the founding president of Planned Giving Services, which was acquired by PG Calc. Frank is a past president of the National Committee on Planned Giving (NCPG®) and is a recipient of NCPG®'s Distinguished Service Award and CAGP-ACPDP™'s Friend of CAGP award. He is a frequent seminar speaker and co-author of *Planned Giving for Canadians.*

Paul C. Nazareth

A full time gift planner for nine years, Paul has worked with Scarboro Missions, the University of Toronto and currently with the Catholic Archdiocese of Toronto. An active volunteer, Paul is Co-chair of the CAGP-ACPDP™ GTA LEAVE A LEGACY™ program, a former board member of the Canadian Charitable Annuity Association and 2008 recipient of the CAGP-ACPDP™ GTA RoundTable Jasmine Sweatman Award. Paul is a tireless advocate of the benefits of positive networking.

Jill Nelson CFRE

Jill Nelson is Director of Planned Giving at the Princess Margaret Hospital Foundation. She has over 17 years of fundraising experience, including work with the Canadian Paraplegic Association Ontario and the Canadian Cancer Society (Ontario Division). She served for several years on the Toronto CAGP-ACPDP™ RoundTable and is currently the CAGP-ACPDP™'s representative on the CFRE International Advisory Council.

DeWayne Osborn CGA, CFP

DeWayne is a Past-Chair of the National CAGP-ACPDP™ Board of Directors and Faculty of the CAGP-ACPDP™ Gift Planning Course in Whitepoint, Nova Scotia. He is the winner of the 2003 CGA Manitoba Sharing Excellence Award and author of the website A Charitable Guide to Planned Giving. DeWayne has 13 years of experience working in charities and not-for-profits and is a regular presenter on planned giving issues.

Michelle M.B. Osborne CFRE

Michelle is Director, Gift Planning at the University of Toronto and is responsible for the overall U of T gift planning program. Having worked for the Royal Ontario Museum Governors and SickKids Foundation, her focus has always been in the area of gift planning. A long-time member of the Canadian Association of Gift Planners, Michelle has been chair of the National Conference Education committee for the last four years.

William Petruck

William Petruck is President and CEO of FUNDING matters Inc. FUNDING matters works with non-profits and allied professionals to promote transformational philanthropy. FUNDING matters educates, informs and empowers individuals to make sound charitable giving decisions based on their values, views, family and financial objectives.

Doug Puffer

In 1987 Doug Puffer began his journey as a fundraiser with Ducks Unlimited Canada, then with Queen's University and currently as Director of Planned Giving for Simon Fraser University. He learned the craft of gift planning from a broad spectrum of excellent teachers over the last 15 years; through ideas exchanged with extraordinary colleagues and by being welcomed in the homes and offices of many wonderful donors and professional advisors.

Cindy Radu LL.B., FCA

Cindy Radu is president of Cidel Trust Company. She is a lawyer and an accountant with experience in all aspects of developing and implementing sophisticated estate plans. Cindy co-authored *Taxation and Estate Planning in Canada* and has taught both the estate planning and trust law courses at the University of Calgary and has published numerous articles in the area of taxation. She is a Fellow of the Institute of Chartered Accountants of Alberta.

Christopher J.K. Richardson FCA

A co-founder, founding director of CAGP-ACPDP™ and 2007 Friend of CAGP award recipient, Christopher helps donors to identify and achieve their philanthropic dreams and ensures that charities understand and encourage planned gifts. As a consultant to charities, Christopher assists them with regulatory compliance, gift 'trouble shooting', forensic advice and board of directors and staff training. Completing the loop, Christopher works with advisors to assist them to listen for "charitable hints".

S. Kelly Rodgers CFA

Kelly Rodgers has over 25 years experience in investment management and investment consulting. In 1993, she formed Rodgers Investment Consulting to provide portfolio analysis, asset management consulting and manager search services for not-for-profit organizations, individuals and aboriginal communities. Ms. Rodgers has been published and quoted frequently in the major business press and has spoken frequently on the relationship between investment policies, spending policies and governance.

Ann Rosenfield CFRE

Ann Rosenfield is the Director, Major Gifts for CNIB. In addition to her award-winning work, Ann has provided workshops for a wide range of groups including the AFP International Conference, CAGP-ACPDP™, Georgian College, Humber College, the Commonwealth Club, the Peninsula Community Foundation, and the AFP Canadian Congress.

Sarah Rothwell CFRE

Sarah is Vice President Leadership Giving and Chief Privacy Officer at North York General Hospital Foundation. As Director of Planned Giving at the Foundation, she successfully delivered two Legacy Campaigns and an Endowment Campaign, a first for a Toronto hospital. She also successfully completed a $35 million Capital Campaign and is currently in the early phases of a $50 – 70 million campaign.

Jo-Anne Ryan PFP

Jo-Anne Ryan is Vice President, Philanthropic Advisory Services at TD Waterhouse Canada, Executive Director and architect of the Private Giving Foundation (PGF). PGF was the first donor-advised fund program launched by a financial institution in Canada. She is a past member of the executive of the CAGP-ACPDP™ Greater Toronto Area RoundTable and a member of the Government Relations Committee. Jo-Anne is active on several gift planning committees for charities and a recipient of the Friend of CAGP Award.

Robert Ryan

Robert Ryan is Vice President and Managing Director of Grenzebach Glier and Associates. Before joining GG+A he was the Assistant Director of the Public Television Major Giving Initiative in Washington DC. Robert has also worked for CARE Canada and was the Manager of Planned Giving at the University of Ottawa.

Brian D. Shea

Brian has held senior management positions with the Alberta Cancer Foundation, the Northern Alberta Institute of Technology, St. Mary's University in Halifax and DVA Navion; and gift planning positions with several organizations including the University of Alberta and St. Paul's Hospital Foundation in Saskatoon. Since 2001, he has been a member of the faculty of CAGP-ACPDP™'s Gift Planning Course. Brian is a past national director of CAGP-ACPDP™ and a frequent presenter at conferences.

Keith H. Sjögren

Keith Sjögren is Director, Research and Advisory Services at Investor Economics, a leading financial services consulting firm. Investor Economics has recently undertaken a study of the charitable sector in Canada. Keith's career spans retail banking and wealth management and, since 1995, management consulting. He sits on the Investment Committee of the Centre for Addiction and Mental Health and acts as an advisor to the Canadian Cystic Fibrosis Foundation.

Amanda Stacey LL.B.

Amanda Stacey is an associate with Miller Thomson LLP in Toronto in the Charities and Not-for-Profit group. Amanda provides both general counsel and specialized tax advice to Canadian and international charities. She regularly advises charities on gifts, bequests and the administration of trusts and estate.

M. Jasmine Sweatman LL.B., TEP, LL.M., E.C., EPC

Jasmine Sweatman is a certified specialist in Estates and Trusts and practices law exclusively in the area of estates, trusts, powers of attorney and related matters with a particular focus on estate litigation. She has extensive experience dealing with charitable bequests and is the author of the book *Bequest Management for Charities*.

Chantal Thomas MBA

Chantal Thomas holds an MBA from HEC Montréal and a Certificate in Philanthropy from the Fund Raising School of Indiana University. She is Director of the Planned Giving and Major Gifts Division at the Université de Montréal. Ms Thomas is a member of LEAVE A LEGACY™ Québec, and is a frequent speaker on major and planned gifts. She is a trained musician, and has served as Vice-Chair of the Montréal Arts Council.

Joshua E. Thorne

Joshua Thorne is a Faculty member of the CAGP-ACPDP™ week-long Canadian Gift Planning course in Banff, Alberta, and is widely recognized for his knowledge of charitable planning issues. A gift planner with over 14 years' experience working with charities, Joshua serves as Vice-President, Development at the Hamilton Community Foundation.

John G. Walker

John Walker is retired from Walker Industries, a company that has been in his family for over four generations. He has served on numerous boards. In 2001 he received an Honorary Doctorate from Brock University; was awarded a Golden Jubilee Medal honouring his many philanthropic achievements in 2002; and The Community Leaders Foundation recognized John in 2008 for his philanthropy. He is currently acting as Honorary Co-Chair of "It's our time" campaign for the new Hospital and Cancer Centre in St. Catharines.

Laura West LL.B.

Laura West is an associate at the law firm of Fasken Martineau DuMoulin LLP where she is engaged in a general practice in the areas of charities and not-for-profit law, wealth management, estate planning and trusts. She has authored several articles and has given presentations on related issues.

Karen Willson CFRE

Ms. Willson, Senior Vice President at KCI, is one of their most accomplished senior leaders, providing strategic direction and project supervision to her clients, as well as leading staff and volunteer training. As a volunteer in her community, Ms. Willson has served as a Board Member for Toronto Youth for Christ and as an advisory Board Member for the Sanfilippo Foundation.

C. Michele Wilson FLMI, CFP, CLU, CH.F.C., FMA

Michele began her career in the life insurance industry in 1987 and joined her father's firm in 1996; becoming the third generation caring for clients, looking after the risks of dying too soon, becoming disabled or living too long. Michele is involved in her professional associations and works with North York General Hospital on their finance and administration committee.

David R. Windeyer M.T.I., T.E.P.

David is the retired National Director, Charitable Trusts Services for the Bank of Nova Scotia Trust Company and has over 40 years experience in the administration and management of estates, trusts, agencies and particularly charitable foundations. He is known for his involvement with many foundations administered by the Trust Company. He continues to assist clients in establishing private foundations, creating giving programs and developing the administration and investment management processes for the foundations.

Julie Wirtanen CFRE

Julie Wirtanen has nearly 20 years of professional fundraising experience in Canada and the U.S. She has held senior fundraising positions in the human services, conservation, and education charitable sectors prior to becoming a fundraising consultant. Julie serves on the board of the AFP Golden Horseshoe Chapter and serves on the committee of AFP's Canadian Council. She has also served on the board of the CAGP-ACPDP™ Niagara/Golden Horseshoe RoundTable.

Mary Jane Wood

Mary Jane Wood is a long time member of CAGP-ACPDP™ and past chair of the Golden Horseshoe Roundtable. Currently Director, Resource Development at Distress Centres in Toronto, she has considerable planned giving experience, most recently at Canada's National Ballet School. Throughout her career she has worked with high level volunteers to successfully build both planned giving and major gift programs.

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16th Annual National CAGP-ACPDP™ Conference April 22 - 24, 2009
The Sheraton on the Falls, Niagara Falls, Ontario

Online conference registration at www.cagp-acpdp.org

First Name ______________________ Last Name ______________________

Title ______________________ Organization ______________________

Address ____

City ______________________ Province ____________ Postal Code ____________

Phone ____________ Fax ____________ E-mail ______________________

Special Dietary Needs or Requests* ______________________________

*An additional fee may apply

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

Full Conference registration fees include all session materials, breakfasts, lunches, refreshment breaks and Thursday evening's banquet.

Early Bird Conference Registration
(Deadline February 27, 2009)
○ CAGP-ACPDP™ Member $650
○ Non-Member $925

Conference Registration
(Deadline April 10, 2009)
○ CAGP-ACPDP™ Member $755
○ Non-Member $1030

CAGP-ACPDP™ Membership
(One Year Term)
○ $299

Additional Registration Fees

Pre Conference Session - "Intro to Gift Planning - All in a Day!"
Tuesday April 21, 2009 from 8:00 a.m. - 6:00 p.m.
○ Full Conference Attendees $199
○ Non-Conference Attendees $250

Gift Planning for Professional Advisors Half-Day*
Friday, April 24, 2009 from 7:30 a.m. - 12:15 p.m.
○ CAGP-ACPDP™ Member $90
○ Non-Member $125

*The fee for the Gift Planning for Professional Advisors Half-Day applies if you are only attending this session and not the full conference.
The session includes breakfast.

Optional Social Activities Evening of Friday, April 24, 2009
○ Dinner and Show at the Skylon Tower $65
(Deadline March 16, 2009)
Additional tickets (10 Max.)______ tickets @ $65 =______

Check Out (please tally up all fields)
Full Conference Registration Fee $ __________

Additional Registration Fee(s) $ __________

Total Amount Due* $ __________
*GST included in fees

○ Cheque (made payable to CAGP Niagara 2009)
○ Visa
○ MasterCard

Credit Card Number ______________________

Expiry Date ____________

Cardholder's Name ______________________

I authorize payment of registration by credit card

Cardholder Signature ______________________

Registration Questions?
Contact the National Office
Tel: (613) 232-7991
Toll Free: (888) 430-9494
Web: www.cagp-acpdp.org
E-mail: conference@cagp-acpdp.org

Cheque Payment
Please make your cheque payable to: **CAGP Niagara 2009** and mail to the CAGP National Office address

Cancellations
Cancellations are subject to a $200 administration fee. No refunds for cancellations received after March 16, 2009. No shows forfeit the full registration fee

National CAGP Office
CAGP-ACPDP™ Conference
325 Dalhousie St. Suite 201
Ottawa, ON, K1N 7G2
Fax: (613) 232-7286

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16th Annual National CAGP-ACPDP™ Conference April 22 - 24, 2009

The Sheraton on the Falls, Niagara Falls, Ontario

Hotel Booking Form

Guest Information

First Name ______________________ Last Name ______________________

Arrival Date __________ Departure Date __________ Organization ______________________

Address ____

City ______________________ Province __________ Postal Code __________

Phone __________ Fax __________ E-mail ______________________

Room Information The Sheraton on the Falls offers the following nightly conference rates to all attendees of the CAGP-ACPDP™ Conference. These rates are valid from: April 19 - April 28, 2009.

Traditional Room

- ◯ Single $165
- ◯ Double $165

Fallsview

- ◯ Single $185
- ◯ Double $185

Additional Person
(Per person per day)

- ◯ $10

Number of Adults __________

*All room rates quoted are exclusive of taxes provincial (5%) and federal (5%) and Destination Marketing fee (3%).
**Please note the hotel has smoke free rooms only.

Check Out (please tally up all fields)

Room Selection $ __________

Additional Person(s) $ __________

Total Amount Due* $ __________

*All room rates quoted are exclusive of taxes provincial (5%) and federal (5%) and Destination Marketing fee (3%).

Cancellation Policy

72 hours notice is required to cancel your reservation without penalty. Should you cancel your guestroom less than 72 hours prior to your indicated arrival date, your credit card will be billed for our first night's room and tax.

Payment Information

(credit card number to guarantee your reservation)

- ◯ VISA
- ◯ MasterCard
- ◯ American Express

Credit Card Number ______________________

Expiry Date __________

Cardholder's Name ______________________

Cardholder Signature ______________________

Reservation Method

Please make your reservations by Monday, March 16, 2009 in one of the following ways:
Call the toll free reservation line
1 800 519 9911 (Valid in Canada & U.S.A.)
Fax this form to the hotel reservations department at 905 371 8349

Book to Win!

If you book by March 16, 2009 at the Sheraton on the Falls Hotel as part of the **CAGP-ACPDP™ Conference,** you will be eligible to win a complimentary two night stay in a traditional room at the hotel.

Restrictions

All reservations made after Monday, March 16, 2009 will be subject to availability and the hotel's prevailing rate. All individual reservations must be guaranteed with one-night's room and tax by credit card, money order or certified cheque at the time of booking. If guests do not arrive, a penalty will be charged of one night's room rate plus applicable taxes

Please Complete and Fax to

Sheraton on the Falls; Reservations Department
Fax: 905 371 8349
Phone: 905 374 4445
5875 Falls Avenue, Niagara Falls, ON L2E 6W7.

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16th Annual National CAGP-ACPDP™ Conference April 22 - 24, 2009

Workshop Session Sign-Up Form

First Name ______________________ Last Name ______________________

Phone ______________ E-mail ______________________

Workshop Selection Please indicate your first (1) and second (2) choice of session per timeslot as space is limited.
*Traduction Simultanée

Wednesday April 22, 2009 1:30 p.m. - 3:00 p.m.

__ Philanthropic Trends (Intermediate) W1.1
__ Social Capital & Social Entrepreneurship (Intermediate) W1.2
__ Creative Donations of Real Estate (Advanced) W1.3
__ Gift Planning Overview* (All) W1.4
__ The Year on Government Relations (All) W1.5

Thursday April 23, 2009 9:00 a.m. - 10:30 a.m.

__ Monitoring Bequests/Estate Administration* (Introductory) W2.1
__ Developing a Gift Acceptance Policy (Intermediate) W2.2
__ Speaking Their Language (Intermediate) W2.3
__ Maintaining Donor Confidence (Intermediate) W2.4
__ Bridging Major & Planned Giving (Intermediate) W2.5
__ Mental Capacity & Incapacity (Intermediate) W2.6

Thursday April 23, 2009 11:15 a.m. - 12:15 p.m.

__ Making Understanding Tax Fun* (Introductory) W3.1
__ The Family Business of Philanthropy (Intermediate) W3.2
__ Reporting to the Board (Intermediate) W3.3
__ Donor Rights and Remedies (Intermediate) W3.4
__ Gifts of Securities (Intermediate) W3.5
__ Integrating Will, Estate & Charitable Planning (Advanced) W3.6

Thursday April 23, 2009 2:00 p.m. - 3:00 p.m.

__ Gift Planning in Turbulent Times* (Intermediate) W4.1
__ Building an Effective Planned Giving Program (Intermediate) W4.2
__ Essential Charity Law Update (Intermediate) W4.3
__ Working with High-level Volunteers (Intermediate) W4.4
__ Donor Case Studies: Designing Charitable Gifts (Intermediate) W4.5
__ To Bequest or Not to Bequest (All) W4.6

Thursday April 23, 2009 3:45 p.m. - 4:45 p.m.

__ Tips, Templates, Samples & Examples (Introductory) W5.1
__ Endowing Charitable Donations Part II (Intermediate) W5.2
__ The Ultimate Gift of Citizen Kane (Intermediate) W5.3
__ Gift Planning: The Heart of a Successful Campaign (Intermediate) W5.4
__ Gifts of Insurance* (Advanced) W5.5
__ Positive Networking (All) W5.6

Friday April 24, 2009 9:00 a.m. - 10:30 a.m.

__ Building Relationships Through Story Listening* (Introductory) W6.1
__ Creating a Proactive Stewardship Program (Intermediate) W6.2
__ Perspectives on the Charity as Executor & Estate Trustee (Advanced) W6.3
__ Investment Management for Medium or Smaller Sized Shops (All) W6.4
__ Professional Advisors Panel (All) W6.5

Friday April 24, 2009 11:15 a.m. - 12:15 p.m.

__ Life Insurance: Jeers & Cheers (Introductory) W7.1
__ Everything to Know about Sticky Questions (Intermediate) W7.2
__ Building a Network That Works (Intermediate) W7.3
__ Congregation as Crucible (Intermediate) W7.4
__ The Perfect Blendship* (Advanced) W7.5

Friday April 24, 2009 1:30 p.m. - 2:30 p.m.

__ Success is in the Numbers* (Introductory) W8.1
__ The 7 Giving Personalities (Intermediate) W8.2
__ Understanding Private Foundations (Intermediate) W8.3
__ Relationship Building: Multidisciplinary Wealth Management Teams (Advanced) W8.4
__ Integrating Major & Planned Giving (Advanced) W8.5

Please Complete Reverse Side of Form

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The Sheraton on the Falls, Niagara Falls, Ontario

Toolbox Topic Sign-Up Sheet

Registrant Information

First Name ____________________ Last Name ____________________

Title ____________________ Organization ____________________

Address ____

City ____________________ Province __________ Postal Code __________

Phone ____________________ Fax ____________________

E-mail ____

Toolbox Topic Selection Please choose only **one** Toolbox topic. Topic discussions are limited to tables of eight. All Toolbox Sessions are Thursday, April 23, 2009 at 12:15 p.m. to 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
- ○ Regional vs National Gift Planning in Your Organization
- ○ Tracking Your Planned Giving Activities
- ○ The Donor Visit
- ○ Engaging the Next Generation of Donors
- ○ How Tax Technical Do I Have to Be?
- ○ Integrating a Planned Giving Goal into an Overall Campaign
- ○ Starting the Conversation - Talking to Donors/Prospects about Planned Giving
- ○ Marketing Materials - What Works, What Doesn't
- ○ Annuities
- ○ Government Relations Committee
- ○ Working with Community Foundations
- ○ Working with Professional Advisors
- ○ Ethics in Gift Planning
- ○ Working with a Volunteer Planned Giving Committee
- ○ New Proposed Fundraising Activity Policy
- ○ CFRE Accreditation
- ○ Board Buy-In
- ○ Benchmarks for Planned Giving Officers
- ○ Stewarding Donors Who Give Through Donor Advised Funds

Please return this form to the CAGP-ACPDP™ National Office

FAX
Attention: Anne Williams
613 232 7286

MAIL
Attention: Anne Williams
325 Dalhousie Street, Suite 201
Ottawa, ON, K1N 7G2

E MAIL
conference@cagp-acpdp.org

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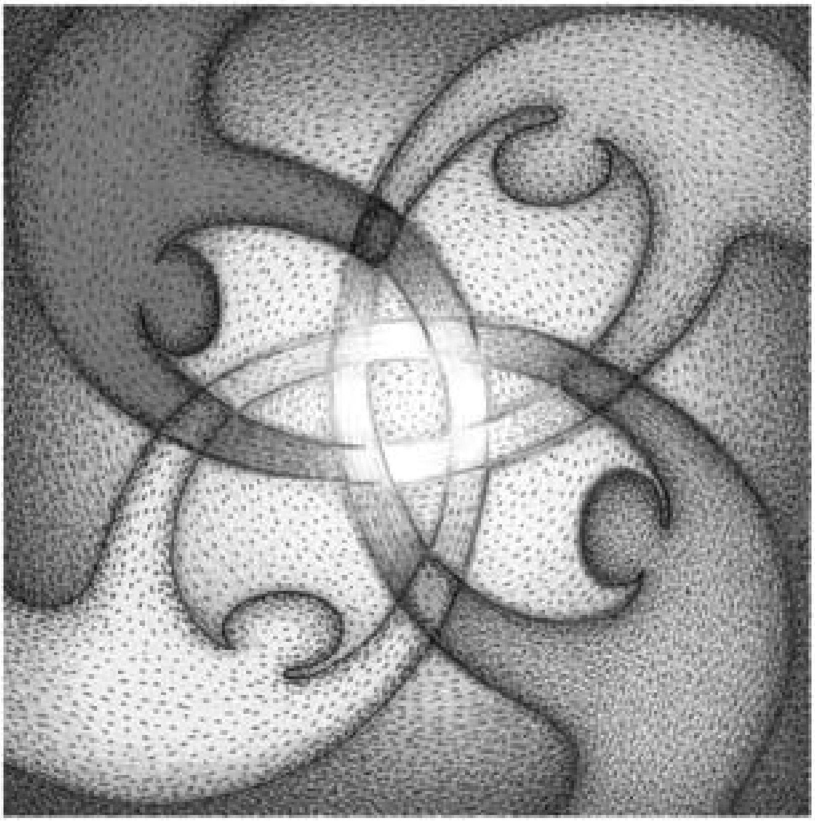

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