

Approved Provider For



Canadian Association of Gift Planners - London Roundtable  
 2009-2010 Education program calendar  
 TGIF Lunch & Learn Friday series

Issued June 19, 2009  
 Updated Feb 19, 2010

11:45 a.m. to 1:30 p.m.  
 Windermere Manor, London

CAGP London Roundtable gratefully acknowledges CIBC Wood Gundy, Fraser Wilson and John Robinson for their very generous support of the 2010-2011 Educational Programs!



	Date	Session Title & Speaker 1 1/4 hour session begins at 12:15	Description	Session Tickets Members	Session Tickets Non-members	RSVP by
2009	Friday September 11	<b>Now More than Ever: Legacy Giving in Extraordinary Times</b>  With featured guest: Joshua Thorne, Charitable Gift Planner	Join us as we explore how donors, professional advisors and charity based gift planners can collaborate to develop and implement comprehensive gift plans that achieve donor's philanthropic aspirations. Even in challenging times, legacies can be created that make a difference in the lives that follow.	\$25	\$40	Sept. 8
2009	Friday November 13	<b>Your Case for Support and Donor Case Studies</b> <i>the cornerstone to a successful development program</i>  With featured guest: Gina Eisler, CFRE, Vice President Philanthropy, Scarborough General Hospital Foundation	How do you take your organization's "wish list" and turn it into a tool to raise funds? Gina Eisler has been writing cases for more than ten years. In this session you will learn the steps for writing your organization's case for raising funds, what materials you need to collect, key steps in the case development process, moving the case from resource document to brochure & making your case compelling.	\$25	\$40	Nov. 10
2010	Friday January 8	<b>Asking for Planned Gifts</b> Taking the fear out of the ask  With featured guest: Malcolm Burrows, Head, Philanthropic Advisory Services Scotiatrust	Asking for planned gifts is an essential part of getting planned gifts. The challenge is to figure out how and when to ask for significant planned gifts, such as bequests. The session will address the many ways to solicit planned gifts. Special attention will be paid to the interaction of philanthropy vs. tax and the challenges associated with the often unstructured nature of this very personal form of fundraising.	\$25	\$40	Jan. 5

**\*All sessions listed have CFRE approval for Continuing Education points**

2010	Friday March 12 Windermere Manor	<b>Marketing Planned Giving/Planned Giving Today - HALF DAY Session</b> 8:30am – 1:00pm Lunch at 12:00pm  <b>With featured guest: Ken Ramsay, President and CEO, Legacy Leaders</b>	Join us for an in-depth analysis of recent research findings and tips for development professionals who are interested in maximizing their planned giving activities. Learn simple, highly practical first steps to implementing new approaches to securing planned gifts. This half day workshop will have you feeling challenged and highly motivated to strategically assess or reassess your planned giving programs.	\$40	\$50	Mar. 9
2010	Friday April 16 Windermere Manor	<b>All In a Day Gift Planning Course *8am - 5pm FULL DAY ~ 12pm Lunch</b>  <b>With featured guest: Joshua Thorne, Charitable Gift Planner</b>	Are you new to gift planning and looking to learn about the basics? Or perhaps, you would like a “refresher” - to review all the concepts and tools. Join us as we review together Canadian trends and tax issues, move right into a review of the most common gifts in Canada and conclude with marketing, stewardship and donor recognition. You will walk away with renewed confidence in discussing gift planning concepts with your donors. All in a day!	\$199	\$250	Apr.12
2010	Friday May 7  London Covent Garden Market, Market Hall, Mezz. Level	<b>Leave a Legacy Lunch</b>  <b>With featured guest: *To be announced soon!</b>	Check out a unique and informal networking gathering as we kick off the summer! Learn more about the Leave a Legacy program through casual conversation and discover how professional advisors, charities and not-for-profit organizations encourage planned giving. Organizations currently affiliated with this program include social service agencies, foundations, educational institutions, health, arts and amateur sport organizations, environmental and other philanthropic groups.	\$25	\$40	May 3
2010	Friday June 11 Windermere Manor  <b>Sponsored by: TD Waterhouse - Private Trust</b>	<b>The Ultimate Gift of Citizen Kane</b>  <b>With featured guest: Chantal Thomas, Director, Planned Giving and Major Gifts, Université de Montréal</b>	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.	\$25	\$40	June 8

*“Full participation in these sessions is applicable for 1.0 CFRE Continuing Education points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.”*

**Reservations required for all sessions. USING THE NEW ON-LINE REGISTRATION at**

<http://www.cagp-acpdp.org>

**Did you register and cannot attend? Substitutions or cancellations must be made at least 48 hours prior to the event. An invoice will be sent to guests who have not notified the CAGP London Roundtable Coordinator at least 48 hours prior to the session that they are unable to attend.**