

HOW TO JOIN CAGP-ACPDPTM

CANADIAN ASSOCIATION OF GIFT PLANNERS
VANCOUVER ISLAND
ROUNDTABLE



THE PRESENTATION SERIES 2009.2010

TO RESERVE FOR EVENTS
or for more information about
The Presentation Series,
contact Natasha Benn at
nbenn@uvic.ca

CAGP·ACPDPTM
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIÉS

WHO WE ARE AND
WHY YOU SHOULD JOIN US!

CAGP·ACPDPTM
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIÉS

CAGP-ACPDPTM supports philanthropy by fostering the growth of gift planning. We create awareness, provide education and act as advocates of charitable giving.

We bring together professionals from various disciplines to ensure that the gift planning process achieves a fair and proper balance between the interests of donors and the aims and objectives of registered charitable organizations in Canada in accordance with the CAGP-ACPDPTM Code of Ethics.

Our LEAVE A LEGACY™ program is a collaborative effort designed to preserve and improve the quality of life in our community. It encourages people from all walks of life to make gifts through a will or other gift planning instrument to the charity or non-profit organization of their choice.

BENEFITS OF MEMBERSHIP IN THE
CANADIAN ASSOCIATION OF
GIFT PLANNERS

National & local networking opportunities

Ethical and Professional Standards

Membership in local Roundtable

Mentoring, idea sharing, networking, education, seminars and workshops within local Roundtable activities

CAGP-ACPDPTM Planner Newsletter

Updates on legislation affecting the technical issues of gift planning

Reduced rates for annual conference and educational activities

Members-only section of website provides resources, educational articles, research findings and Membership Directories

Website provides information on Roundtable activities, job postings, and upcoming CAGP-ACPDPTM events

Promotion through LEAVE A LEGACY™, the public awareness program of CAGP-ACPDPTM

CAGP·ACPDPTM
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIÉS

On the web:
www.cagp-acpdp.org

By phone:
1.888.430.9494

Annual membership
\$299 (incl. GST)

Annual student membership
\$80 (incl. GST)

For more
information on
membership or
The Presentation
Series, contact
Natasha Benn
nbenn@uvic.ca

WEDNESDAY, SEPTEMBER 30, 2009
SEASON LAUNCH AT THE BARD & BANKER

Come knock back a drink or two and enjoy a leisurely networking visit with your colleagues in the gift planning community as we discuss CAGP membership benefits and how to get the most from your membership; an introduction to this season's professional programming with registration opportunity; an introduction to Leave a Legacy™ community programming and a review of scholarship opportunities available to CAGP Vancouver Island members.

4:30 - 6:30 pm
The Bard & Banker Pub
Complimentary admission - bring a friend!

TUESDAY MARCH 9, 2010
A COMPARISON OF GIFTS OF APPRECIATED SECURITIES AND CHARITABLE REMAINDER TRUSTS
JOINT MEETING WITH THE VICTORIA ESTATE PLANNING COUNCIL
SUSAN MEHINAGIC, MANAGING PARTNER, GRANT THORNTON LLP

Gifts of appreciated securities and charitable remainder trusts are rarely straightforward, but they can be well worth the effort if your organization is equipped to accept them. This session, presented by Victoria Estate Planning Council and CAGP member Susan Mehinagic, will provide you with a working knowledge of the pros and cons of making and accepting these types of gifts.

12:00 - 1:30 pm
Union Club of BC 805 Gordon Street, Victoria
Members \$20

THURSDAY, NOVEMBER 12, 2009
WILLS VARIATION ACT
& ITS IMPACT ON CHARITIES
HEATHER FISHER, PARTNER
HORNE COUPAR

Join us for this informative session where we will discuss the impact of the Wills Variation Act on charities. Drawing on her extensive work in estate litigation, Heather Fisher will provide us with an overview of the Act, and explore the current case log to learn how the courts are interpreting these cases. We will also focus on testamentary freedom and charitable intent, and options for charities when dealing with a claim.

12:00 - 1:30 pm
Union Club of BC 805 Gordon Street, Victoria
Members \$20 Non-Members \$35

THURSDAY, MAY 20, 2010
PHILANTHROPY AND THE FAMILY BUSINESS
JOINT MEETING WITH
THE CANADIAN ASSOCIATION OF FAMILY ENTERPRISE (CAFE)

You are invited to this panel discussion about the unique aspects of philanthropy and gift planning that impact charitable decisions for those who own a family business. Featuring Shelagh Rinald, CA, CFP & TEP, of Rinald Tax Advisors and Sara Neely, LLB, Director of Philanthropic Services at the Victoria Foundation.

7:30 - 9:00 am
Union Club of BC 805 Gordon Street, Victoria
Members \$20

THURSDAY, JANUARY 21, 2010
PLANNED GIVING 101 - LEGACY BUILDING
CARLA FUNK, DIRECTOR OF DEVELOPMENT
BC CANCER FOUNDATION
PATRICK CORRIGAN, DIRECTOR OF MARKETING & DEVELOPMENT
PACIFIC OPERA VICTORIA

You have steadily been building your legacy giving program and have a confirmed gift! This workshop will investigate planned giving from start to finish, and will be relevant to both charities and advisors who are new entrants to planned giving as well as those with existing planned giving structures in place. It will provoke your thoughts on the planned giving process and equip you with tools to achieve the goals and dreams of both your organization and the generous donors.

Lunch and light refreshments provided.
8:30 am - 12:30 pm
University Club, University of Victoria
Members \$40 Non-Members \$50

WEDNESDAY, JUNE 9, 2010
TO BEQUEST OR NOT TO BEQUEST:
THAT IS THE QUESTION
DOUG PUFFER, DIRECTOR, PLANNED GIVING
UNIVERSITY ADVANCEMENT, SIMON FRASER UNIVERSITY

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

12:00 - 1:30 pm
Union Club of BC 805 Gordon Street, Victoria
Members \$20 Member Guests \$35

PLAN TO MAKE YOUR WISHES COME TRUE
LEAVE A LEGACY SERIES ON PLANNED GIVING



This timely series is brought to you by the LEAVE A LEGACY™ program of Vancouver Island and the Greater Victoria Public Library. LEAVE A LEGACY™ is a program of the Canadian Association of Gift Planners. Find out more at www.leavealegacy.ca.

BUILDING YOUR LEGACY
WITH A CHARITABLE GIVING FUND
PRESENTED BY FRAN DAVISS AND ANGELA WRIGHT
TUESDAY, SEPTEMBER 29

PLANNED GIVING: WHY AND HOW TO MAKE IT HAPPEN
PRESENTED BY SARA NEELY
TUESDAY, OCTOBER 27

THE HOW TO AND WHY TO OF ESTATE PLANNING FOR YOU AND YOUR BENEFICIARIES
PRESENTED BY BRENDA MILBRATH
TUESDAY, NOVEMBER 24

TAX PLANNING AND YOUR WISHES:
MAKE IT WORK FOR EVERYONE
PRESENTED BY DAWN TIPTON
TUESDAY, JANUARY 26

THE TRUTH ABOUT POWERS OF ATTORNEY & REPRESENTATION AGREEMENTS:
ENSURING YOUR WISHES COME TRUE
PRESENTED BY JOHN COUPAR
TUESDAY, FEBRUARY 23

LEGACY GIVING: THE JOYS OF GIVING AND RECEIVING
PRESENTED BY NORMA CAMERON
TUESDAY, MARCH 30

Each presentation runs from 1:30 to 3:00 pm and is a one-hour followed by a 30-minute question and answer period. All sessions are FREE & are held in the Meeting Room at the Nellie McClung Branch, 3950 Cedar Hill Road.

Please call 250.477.7111 to reserve your space for the program(s) you wish to attend.

NATIONAL PHILANTHROPY DAY THURSDAY, NOVEMBER 19, 2009 - FAIRMONT EMPRESS HOTEL

National Philanthropy Day celebrates the amazing work and support of our local donors, volunteers and institutional partners whose outstanding gifts of time, expertise and resources contribute to the success of our community's not-for profit sector.

7:30 - 9:30 am

Tables of 10 \$325

Individuals \$35

Call Tami Tate to reserve at 250.595.8381 or by email tami.tate@tttconsulting.ca