

**The CAGP Ottawa Roundtable Presents  
Advance Yourself – Part III - Half-Day Conference  
November 19, 2009 (7:30 am to 1:00 pm)  
Chimo Hotel**

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**Breakfast Plenary Session**

“Did the Fall of Lehman Brothers Change Gift Planning?”

Keynote Speaker

**Malcolm B. Burrows, CFRE, Scotia Private Client Group**

**Sessions**

1. Gifts of Insurance  
**Alain Lévesque, President, DeVimy Group Inc.**

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.

2. Once Upon a Time...  
**Leah Eustace, CFRE, Managing Partner, FLA Group**

Learn about the power of a good story, and how stories can enhance your planned giving program.

3. Essential Charity Law Update: What every gift planner needs to know.  
**Terrance S. Carter LL.B. & Karen J. Cooper LL.B., Carters Professional Corporation**

This session will provide 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.

4. Bring insight and inspiration to your supporters  
**Gary Pluim, Executive Director, WaterCan**

**Lunch Plenary Session**

“Planning for Success – Major Gifts and Planned Giving Working Together”

Keynote speaker

**Greg Lichti CFRE, Toronto Princess Margaret Hospital**