

The Greater Montreal RoundTable presents
Philanthropy and Gift Planning
Half-Day Gift Planning Conference

Wednesday March 17, 2010

8:00 am to 1:30 pm

Le Nouvel Hôtel,
Mathieu & Atwater Rooms
1740 René-Lévesque West
Montreal

Marc Jolin



Robert Kleinman



Lorna Somers



Registration

By March 1st:

Leave a Legacy Partner or AFP/CAGP Member **125 \$** / Non-Member **150 \$**

After March 1st:

Leave a Legacy Partner or AFP/CAGP Member **150 \$** / Non-Member **175 \$**

Register online

To register or for more information:
maryse.legault@slc-lr.ca

8:00 am – 9:00 am

Registration & Networking Breakfast

9:00 am – 10:15 am

Elements of Taxation

Marc Jolin

(Conference in French)

This conference will address several forms of donations and their tax treatment. Marc Jolin will provide examples of well planned gifts and poorly planned donations. He will explain Tax Court decisions on donations to charities as well as types of "gifts" that agencies must avoid.

10:30 am – 11:45 am

Meeting Potential Donors

Robert Kleinman

(Conference in French)

You've decided to arrange meetings with potential donors ... You wish to prepare material to brief them on which options are available ... This is your presentation.

12:00 pm – 1:30 pm

Networking Lunch

Gift Planning and The Art of Echoes

Lorna Somers

(Conference in English)

Remember the headlines? "The New Hard Times". "World on Edge". "And Now for the Really Bad News". It almost made you nostalgic for a simpler time when front pages were filled with photos of Brangelina. Almost. Not only were the markets plummeting, corporations collapsing and individual despairing, we were charged with the responsibility of going out, meeting with prospects and asking them to give us what money they had left! So what lessons were learned and how might we recalibrate our programs and our own strategies as we work harder than ever to raise much needed resources for our organizations? By first looking back, we'll have a sharper perspective with which to look forward towards how we can position ourselves for ongoing success.