

SAVE THE DATE!

CAGP Manitoba cordially invites you to attend an educational session on:

**June 1, 2010
8:30 a.m. – 2:00 p.m.
Victoria Inn
1808 Wellington Avenue**

8:30 – 11:30 TECHNICAL ASPECTS OF GIFT PLANNING: AN UPDATE

Presented by:

DeWayne Osborn, Lawton Partners

Leilani Kagan, Thompson Dorfman Sweatman

The topics for this session will include elimination of the disbursement quota in the recent budget, fundraising guidelines, charitable beneficiary designations, appraisals, executor duties in bankrupt estates and tax shelters associated with charities.

11:45 - 1:45 Lunch

GIVING AWAY YOUR WEALTH TO FULFILL YOUR DREAMS

Luncheon Speaker: Robert Livingston, McLean Budden

Giving away your wealth starts with defining your dreams. As we approach the end of our life, assuming there is a well financed retirement in place, the only two options for our wealth is to leave it to our family or the community we live in. Bob discusses the difference between success and significance regarding wealth management. Success is about how we acquire and manage our wealth. Significance is how we give it away. Planning plays an extremely important part in this process.

**COST: Both sessions - \$75 for CAGP and AFP members and \$95 for non members
Lunch Only - \$35**

Bursaries to attend this event are available courtesy of



For a bursary application, please contact CAGP Manitoba Chair Sara Penner at spenner6@sbgh.mb.ca.

TO REGISTER FOR THIS EVENT, [CLICK HERE](#)