

***CAGPTM Niagara/Golden Horseshoe Roundtable presents
A Professional Development Lunch***

DATE February 19, 2010 11:45 am – 1:30 pm

LOCATION Burlington Golf & Country Club, 422 North Shore Blvd.
<http://www.burlingtongolfclub.com/index.cfm?ID=78>

SPEAKER **Lance R. Wiebe CFP CSA P. Eng.**
Financial Advisor
Professional Investment Services (Canada) Inc.

TOPIC **The Hidden Opportunity**

In today's economy it is easy to tap out existing loyal donors and create donor fatigue. With the changes to tax laws and integrating unique Financial Strategies, there is however a vast untapped potential of donors that given the right advice from both the gift planner and the advisor, may create an ongoing cash flow for the charity, a legacy gift for the charity and place the donor in a better cash flow position.

This presentation uncovers the potential that exists and reviews the steps that need to be taken to create a win financially for both the donor and the charity.

This does take a new approach from the Gift Planner coupled with a solid knowledge and motivation on the part of the Financial Advisor. Learn the series of steps and due diligence it takes to create this winning partnership.

BIOGRAPHY

Lance Wiebe is an Independent Financial Advisor and resides with his wife and 4 children in Fonthill. He is actively involved in the Rotary Club of Fonthill and a member of the Estate Planning Council of Niagara and the Pelham Canada Day Committee. He teaches Financial Planning Courses through the Community Education Services of DSBN as well as Economics and Business Entrepreneurship at Niagara College. Lance firmly believes that there is great potential to improve both the financial well being of our local charities and the donors of our community.

Lance graduated from the University of Waterloo in Mechanical Engineering and went on to complete the requirements for the Canadian Securities Course, Certified Financial Planner , Insurance Licensing, Certified Senior Advisor and Financial Planning Diploma.

REGISTER online at www.regonline.com/NiagaraFeb19

COST \$30 members / \$35 non-members

The Canadian Association of Gift Planners (CAGP) TM advances philanthropy by fostering the quality of growth of charitable gift planning. The Association, with over 1,250 members across Canada, provides an educational forum to support the charitable sector and its professional advisors.