CAGP • ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONS PLANIFIÉS

CAGP Annual Conference

Tuesday, October 19th, 2010
8:00 a.m. to 4:00 p.m.

Presented By...
The Canadian Association of Gift Planners,
Niagara Golden Horseshoe Roundtable

Presented At...
The Waterfront Centre at The Chamber
555 Bay Street North, Hamilton, ON L8L 1H1
Tel: (905) 522-1151

Illuminating the Fundraising Scope for Tomorrow

Conference for Fundraisers, Advisors & Board members

The purpose of the Canadian Association of Gift Planners is to support philanthropy by fostering the development and growth of gift planning. The Association creates awareness, provides education and is an advocate of charitable giving.

The Association brings 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-ACPDP™ Code of Ethics.

Established in1993 and incorporated in October 1997, the Canadian Association of Gift Planners (CAGP-ACPDP™) is a federally registered non-profit corporation with no charitable status and is primarily funded by members' dues.

2010 Conference Sponsors:

Mackenzie INVESTMENTS

SB Partners
CAs and MORE™

Tuesday, October 19th, 2010
The Waterfront Centre at The Chamber

Conference Workshop Sessions
All registered delegates must choose, in advance, the three workshop sessions they would like to attend. Please complete the registration form with your workshop selections. Workshops are designed to provide a myriad of learning opportunities for all development professionals, Board members and advisors.

Program At-A-Glance

8:00 a.m. - 8:45 a.m. ***Registration***
Buffet Breakfast

8:45 a.m. - 9:00 a.m. ***Opening Remarks***
Nancy Handrigan

9:00 a.m. - 9:45 a.m. ***Morning Plenary***
Ian M. Fraser: Mastering the Current Environment… Emerging Trends in Gift Planning

9:45 a.m. - 10:00 a.m. ***Break***

10:00 a.m. - 11:00 a.m. ***SESSION 1***
1A Gina Eisler: Stewardship for Today's Gift Planning Donor: Beyond Moves Management and Donor Walls
1B Kelly Sodtka: Capital Campaigns and Planned Giving - an Integrated Approach
1C Laura West: The Enforceability of Charitable Pledges and Restricted Charitable Gifts

11:00 a.m. - 11:15 a.m. ***Break***

11:15 a.m. - 12:15 p.m. ***SESSION 2***
2A Ian M. Fraser & Lisa Gonnering: Charitable Gift Annuities… Gifts that Give Back!
2B Karen Bjerland: Topping up an Advisor's Toolkit for Philanthropy
2C Léony deGraaf: Creating Meaningful Legacies through Life Insurance

12:15 p.m. - 1:30 p.m. ***Lunch Plenary***
Heather Turnbull: Commitment: Engaging Heads and Hearts for the Work of a Lifetime

1:30 p.m. - 1:45 p.m. ***Break***

1:45 p.m. - 2:45 p.m. ***SESSION 3***
3A John Chisholm & Roy Sieben: Engage your Board with the Story Behind the Numbers
3B Lorne Jackson: Demystifying Giving Funds Through Public Foundations
3C Adam D. Cappelli: Attacking a Will - Protecting Your Rights as Beneficiary

2:45 p.m. - 3:00 p.m. ***Closing Remarks***

3:00 p.m. - 4:00 p.m. ***Afternoon Networking Opportunity***
Harbour View Reception

The Sessions

9:00 a.m. - ***Opening Plenary Session***

Ian M. Fraser, MBA, FAHP, Senior Counsel
PlanGiv Consulting Services
Mastering the Current Environment... Emerging Trends in Gift Planning

When interest rates are low, stock values are flat and the general economy is still recovering, people feel less secure and perhaps unwilling to consider a planned gift to your organization. Against the backdrop of a difficult economic environment and acknowledging the promise of intergenerational wealth transfer ahead, this session will explore the emerging trends in Canadian gift planning and the related opportunities to cultivate and secure more planned gifts.

10:00 a.m. - ***Session 1***

1A **Gina Eisler, MA, CFRE**
Scarborough Hospital Foundation
Stewardship for Today's Gift Planning Donor: Beyond Moves Management and Donor Walls

Stewardship is labour intensive, requires sophisticated tracking and proper management of each donor's file - especially for those making major or planned gifts. Stewardship involves donor recognition systems and programs, employees with special skills dedicated to manage it and the resources required to provide it properly - from recognition events to reports - stewardship is changing the way our organization's operate. This session will address donor recognition, stewardship, engagement ideas and provide samples of tools used whether you are a small shop with a black and white printer or a larger organization with a writer and binding machine. Some true stories, examples, idea sharing will conclude the discussion.

1B **Kelly Sodtka, BA**
Brock University
Capital Campaigns and Planned Giving - an Integrated Approach

This session will discuss different models of how planned giving and capital campaigns can work together and will take you through the journey of the planned giving officer, their involvement in annual fund and planned giving campaigns and how to train officers to manage their own planned giving opportunities while in campaign mode.

1C **Laura West, BA, JD**
Fasken Martineau DuMoulin LLP
The Enforceability of Charitable Pledges and Restricted Charitable Gifts

This presentation will deal with issues regarding the enforceability of charitable pledges and restricted charitable gifts, including issues such as: What is a charitable pledge and what are its legal consequences? If a donor (or the donor's estate) no longer wishes to satisfy a charitable pledge, are there any legal avenues available to the charity to ensure the charitable pledge is made? What are restricted charitable gifts and what legal obligations do they impose on charities? Does a charity have to continue to abide by restrictions placed on charitable gifts by a donor (either during his or her lifetime or pursuant to the provisions of his or her Will?).

11:15 a.m. - ***Session 2***

2A **Ian M. Fraser, MBA, FAHP, Senior Counsel,**
PlanGiv Consulting Services
Lisa Gonnering, Estate & Gift Planning Officer
St. Joseph's Healthcare Foundation
Charitable Gift Annuities... Gifts that Give Back!

Gifts that provide lifetime income to donors are a special type of future gift, but with some very important differences. Gift annuities require an irrevocable transfer of assets from the donor to the charity. These irrevocable gifts provide immediate tax benefits, although the donation receipt is not as large as for outright gifts. This session will explore the opportunities that gift annuities present to donors and the organizations that promote them, using real-life case studies to illustrate important planning concepts.

2B **Karen Bjerland**
FaithLife Financial
Topping up an Advisor's Toolkit for Philanthropy

This interactive session goes beyond the technical tools advisors use when exploring philanthropic giving with clients. Inspire clients to ACT by using the tools that help you get underneath their conversation about leaving a legacy to family and society.

2C **Léony deGraaf**
deGraaf Financial Strategies
Creating Meaningful Legacies through Life Insurance

This session will review the simple ways to increase the size of gifts and legacies to your organization using life insurance and the benefits to the charity, the estate and the donor.

The Sessions - Cont.

12:30 - 1:30 p.m. - ***Lunch Plenary***

Heather F. Turnbull, BA (Hons.), CMF

Turnbull Consulting Group

Commitment: Engaging Heads and Hearts for the Work of a Lifetime

Attracting talent is a priority for most organizations and usually falls to leadership to pursue. But with increasing demands on their time and shrinking resources, CEOs/EDs and Board Chairs are falling short of their recruitment objectives. Moreover, volunteers aren't fully engaged and are cycling through organizations without contributing their best efforts. What's up with that? Citing examples from multiple sectors, Heather Turnbull will share why leaders today must radically rethink their staff and volunteer talent strategies if they are to remain viable to their stakeholders. As we rapidly shift to more culturally diverse workplaces, demonstrating a culture of inclusion and respect will be the gateway to real commitment and engagement - and a source of significant 'competitive' advantage to organizations embracing this.

1:45 p.m. - ***Session 3***

3A **John Chisholm & Roy Sieben**

SB Partners LLP

Engage your Board with the Story Behind the Numbers

When it comes to ensuring that a not-for-profit organization is financially secure, the buck now stops with every member of its board. The not-for-profit Board of Directors has ultimate fiscal responsibility for your organization. Join John Chisholm and Roy Sieben from SB Partners LLP for an engaging presentation/discussion that will help you understand how the Board uses financial information, and how staff can support the Board's oversight role through the format, content, and presentation of financial information. Learn to evaluate Board members' financial capacity and train them to understand the unique rules and conditions of not-for-profit finance. Discuss how to improve the flow of financial information between staff and Board so that the Board can provide effective oversight and strategic planning.

3B **Lorne Jackson, CFP, CLU, CHFC**

President

Canadian National Christian Foundation

Helping Advisors Build Stronger Client Relationships Through Philanthropy: Demystifying Giving Funds Through Public Foundations

Many financial institutions, mutual fund companies and public foundations offer charitable giving opportunities for clients along with a variety of charitable giving vehicles. But not all opportunities are created equal even if called by the same name. What benefits the client? What benefits the company or the foundation? Are there any risks for the advisor? This seminar will help advisors navigate the myriad differences between the offerings in the industry. We will also discuss the effects of recent changes by CRA for use of Donor Advised Funds and their benefits to the donor as well as advisors.

3C **Adam D. Cappelli, MBA, LLB, TEP, CFP**

Cambridge LLP, Partner

Attacking a Will - Protecting Your Rights as Beneficiary

Elder abuse is more prevalent today than ever before due to the increasingly large senior population. The vast majority of abuse cases relate to financial matters, including duress in the context of making a Will. What protective measures can be put in place to protect a gift from attack by excluded beneficiaries and what weapons can be used to attack a gift allegedly made under duress or where the donor lacked capacity?

3:00 p.m. - 4:00 p.m. - ***Afternoon Networking Opportunities***

Network with colleagues, advisors, sponsors, and conference speakers while overlooking the beautiful harbourfront and enjoy the view at our afternoon reception. Share ideas, trade stories, and build your network of gift planning and fundraising professionals.

Plenary & Workshop Leader Bios

Karen Bjerland
FaithLife Financial

Karen Bjerland has recently taken on the role of CEO and President for FaithLife Financial, a not-for-profit financial services organization serving Canadian Christians. Since joining FaithLife Financial in 1980, Ms. Bjerland has played pivotal roles in a number of areas and has assumed increasingly senior roles including Regional Sales Manager, Director Field & Branch Services, as well as Vice-Presidential roles in Member Services, Field Services, Brand Development, Fraternal and Sales. She is passionate about the work she believes God has called her to do through FaithLife Financial - helping Canadian Christians secure their financial futures, live their values and build a better world. As a not-for-profit, FaithLife Financial shares its earnings with its members and the causes they care about, in their churches, their communities and abroad. In addition, Ms. Bjerland is Board Chair at Trinity Village, a retirement facility in Kitchener, Ontario. She is a Board Member of the Evangelical Lutheran Foundation, and also serves on the board of the Canadian Fraternal Association. She is an active member of her church community, particularly in the areas of stewardship and strategic planning. Karen and her husband Peter take great delight in spending time with their children and grandchildren.

Adam D. Cappelli, MBA, LLB, TEP, CFP
Cambridge LLP

Adam is a Partner of Cambridge LLP. He has been certified by the Law Society of Upper Canada as a Specialist in Estates and Trusts Law. Adam's practice is restricted to the area of estates & trusts law. He is one of a select group of lawyers who have successfully completed both the Certified Financial Planning (CFP) program and the membership requirements of the Society of Trust & Estate Practitioners (STEP). Adam is dedicated to assisting his clients in the development and implementation of their estate plan. Adam also advises executors, trustees and attorneys in respect of their fiduciary obligations in the management and administration of an estate or trust. Adam is often retained by beneficiaries and trustees in respect of bringing or defending a claim involving an estate or trust. The insight he has gained from resolving these disputes has armed him with the knowledge to build a better estate plan for his clients.

John Chisholm
Partner & CEO
SB Partners LLP

For CEO and Partner John Chisholm, it's all about the personal touch. Building and maintaining connections with a diverse group of clients is a priority for John. At SB Partners, John is the go-to person for auditing and tax services, strategic planning and business development. He also has a special interest in transition planning and family-owned businesses. "Family businesses face some unique challenges, and working with them is something I enjoy," says John. "I have a knack for handling the personal dynamics that take place within families. My goal is to help clients who are having problems and making their lives better. If I've helped them sleep better at night, then I've done my job."

Léony deGraaf
deGraaf Financial Strategies

Léony deGraaf is an Independent Financial Advisor practicing in Burlington for 15 years, who specializes in retirement and estate planning. Léony is actively involved in volunteering in the Burlington community, with a focus on educating seniors. As an Elder Planning Counselor, Léony has taken the time to specialize in the needs of today's Retirees & Elders and the special knowledge that is required to best manage this season of life. She is Chair of the Burlington S.A.L.T. Council (Seniors & Law Enforcement Together) and is an Executive Member of Joseph Brant Memorial Hospital Foundation's Gift Planning Advisory Council.

Gina Eisler, MA, CFRE
Vice President, Philanthropy
Scarborough Hospital Foundation

Gina started working in the non-profit sector 18 years ago and has worked in several charities in Ontario, Manitoba and Nova Scotia. Her experience includes major gifts, capital campaigns, annual appeals, stewardship, special events and planned giving. Gina has conducted major gifts campaigns with goals ranging from $1.2 million to $100 million. She received her Certified Fund Raising Executive designation in 1999. After conducting Hamilton Health Sciences Foundation's largest major gifts campaign, she spent one year as their VP of Stewardship - implementing a stewardship program to ensure pledge fulfillment and ongoing donor relations. Gina has been teaching development workshops for more than ten years and in 2009 presented at a development conference at Yale University. She has been the Chair of the AHP Canada Primer Faculty since 2005 and has won five fundraising awards. She completed her Master of Arts in philanthropy and development in 2008. Her thesis was titled, "Donors Without Borders: The Globalization of Philanthropy". Gina is currently the Vice President of Philanthropy for The Scarborough Hospital Foundation, Canada's largest urban community hospital.

Ian M. Fraser, MBA, FAHP
Senior Counsel
PlanGiv Consulting Services

A senior development officer in higher education and healthcare for more than 25 years, Ian is a graduate of Queen's University at Kingston and Ridley College in St. Catharines, Ontario. He began his career in fund-raising as the first Director of Development (and later Vice-President) at Kingston General Hospital from 1983 through 1995, when he then accepted the role of Director of Development at Queen's University. To date, Ian has helped organizations in healthcare, education and the arts raise more than $250 million in private gift support. A respected faculty member of the annual AHP Fund-Raising Institute at the University of Wisconsin, Madison for many years, Ian served as its first Canadian Executive Director for two years (1995-1996). Active in the Canadian Association of Gift Planners (CAGP), he lectures often on all aspects of gift planning in Canada. An alumnus of the Banff Centre for Management's Gift Planning courses, he also served for two years as a faculty member there with Frank Minton and Lorna Somers, noted Canadian authors on this subject. A Fellow for Life of the Association for Healthcare Philanthropy (AHP), Ian continues to be recognized internationally for his expertise in all aspects of strategic planning for non-profit organizations, resource development and gift planning. In 2006, Ian served as a Silver Anniversary Ambassador to help promote the 25th anniversary of voluntary certification for fundraising professionals. He is a Principal with PlanGiv Consulting Services, one of Canada's leading purveyors of estate and charitable gift planning literature, back-office donor-advised gift fund administration and program consulting services. Ian is a Past-President of the Kingston-Frontenac Rotary Club and is a Paul Harris Fellow Award recipient. Ian recently completed a seven-year term as a Board member with the Community Foundation of Kingston and Area (CFKA) where he co-chaired its Professional Advisors Committee. In 2005, he was recognized as a CFKA Ambassador's Circle member for his service to community.

Lisa Gonnering
Estate & Gift Planning Officer
St. Joseph's Healthcare Foundation

Lisa has over 20 years fundraising experience in the not-for-profit sector in Hamilton. She began her fundraising career at United Way in Hamilton then became Director of Marketing & Development with Mission Services of Hamilton. Afterwards, Lisa spent nine years at Redeemer University College specializing in Annual Campaigns. Lisa's marketing and business background has given her success in developing strong annual and membership programs as well as innovative corporate campaigns. Lisa has six years experience in Gift Planning and spent the last five years with Hamilton Health Sciences Foundation and is currently the Estate & Gift Planning Officer at St. Joseph's Healthcare Foundation.

Plenary & Workshop Leader Bios

Lorne Jackson, CFP, CLU, CHFC
President
Canadian National Christian Foundation

Lorne began a career in the Financial Services in the 70's and soon became a Branch Manager for one of Canada's largest firms. After 12 years with them he left to purchase an Independent Financial Planning Company. Under his leadership the company grew from 65 financial advisors to over 1000 independent advisors across Canada. After 25 years in the financial services business Lorne sold his Company, and left the financial services business to create the Canadian National Christian Foundation (CNCF) as a federally incorporated public foundation to serve donors in Canada wanting to give more efficiently and effectively. Lorne still serves as its President yet today. Lorne's work with the Foundation has led him to working with Christian financial advisors and charity leaders in funding God's work across Canada and around the world. He is spending much of his time these days travelling and speaking at Ministry and church events helping raise awareness of the need for gift planning and more effective ways of giving from our estates. With a passion for giving and overall stewardship recently Lorne has written a book on the subject of Stewardship. In his book he points out that stewardship is an often misunderstood and misaligned word. His book entitled, "After the Faith Decision… all else is stewardship" reminds readers that stewardship is not just about money or fundraising but is all of life as we live for our Lord. He also enjoys mentoring numerous business and professional men as well as donating his time to his local church and is Board Chair of a Liberal Arts Christian College in NY. Lorne also enjoys travelling and sharing time with his wife Doris of over 40 years and their two married children and three grandchildren.

Roy Sieben
Partner
SB Partners LLP

In a 24/7 global economy, effective tax planning and nuanced investment strategies are vital to remaining competitive. Roy Sieben works with owner-managed and private businesses in a variety of industries including manufacturing, not-for-profit, landscaping, distribution and construction. Roy works on their behalf to create wealth through effective tax and estate planning, and investment strategies. "Spending time with my clients is the first step towards addressing their concerns," says Roy. "Together we think through their strategic objectives, and then develop a plan that fits their situation and business goals." Roy thrives in the team environment of SB Partners. "Our clients get the benefit of a whole team of professional advisors, all dedicated to helping our clients with their needs."

Kelly Sodtka, BA
Associate Director of Development
Brock University

Kelly Sodtka has been a professional fundraiser since 1993 holding senior fundraising positions in health, social services, educational organizations, including McMaster University, the United Way of St. Catharines & District, and as of March 2008 as Associate Director, Development at Brock University. Kelly earned her BA at Brock. With experience in all facets of fundraising Kelly has successfully worked on capital campaigns, planned giving and annual giving programs. At Brock, Kelly is responsible for major and principal gift activity. As a manager and team leader, Kelly has personally been involved in the successful planning and implementation of several campaigns and fundraising programs and been involved in raising nearly $100M, including the largest gift in Niagara's history, for various causes. Kelly is past Treasurer of the Canadian Association of Gift Planners, Niagara Golden Horseshoe Roundtable, former Steering Committee Member of the Niagara Community Foundation and winner of an AHP Annual Program Award. Noteworthy is the fact that Kelly received an award from the Council for Advancement in Support of Education for her Bequest Campaign.

Heather F. Turnbull, BA (Hons.), CMF
Turnbull Consulting Group

Heather Turnbull founded the Turnbull Consulting Group in 1991, a management consulting practice that provides facilitation solutions to organizations, and leadership advancement strategies to individuals. Her experience as a facilitator, writer, and business skills development professional spans over 20 years and a variety of sectors including financial services, non-profit, health care, education, legal services, engineering, management consulting, information and communication technology, and retail. More recent assignments have focused on integration strategies involving the human component of mergers and acquisitions, specifically talent development and 'culture chemistry'. A native Maritimer, Heather has proudly and enthusiastically served in numerous volunteer capacities, at both the executive and committee levels. Currently she is President of the Association of Career Professionals (ACP) International, as well as Chair of the Board of FAME - Family Association for Mental Health Everywhere, in Etobicoke. Heather is also a Founding Partner of Goddess Martial Arts, an organization promoting wellness, professional effectiveness, and safety to women in the workplace. A fourth degree black belt in two disciplines, in July 2008 she competed with the Canadian Team at the WEKAF (Full Contact Stick Fighting) World Championships in Cebu City, Philippines, achieving a silver medal in her division. In 2006, she won the gold medal for Canada. She frequently speaks on leadership, and the role of volunteers in shaping the new landscape of commitment and change for good.

Laura West, BA, JD
Fasken Martineau DuMoulin LLP

Laura West is an associate with Fasken Martineau DuMoulin LLP, engaged in a general practice in the areas of charities and non-profit organizations, wealth management, estate planning and trusts. Her charities and not-for-profit practice addresses a broad range of services for institutional and individual clients, including establishing and registering charities, advising on compliance and corporate governance issues and the planning and documentation of charitable gifts. Her estate planning practice involves assisting in the development and implementation of estate and tax planning transactions for individuals and institutional clients and the drafting of wills, inter vivos family trusts, domestic contracts and powers of attorney. Laura has lectured and written frequently on charity and estate planning issues for organizations and publications such as the Ontario Bar Association, the Law Society of Upper Canada, the Canadian Association of Gift Planners, the Canada Bar Association, the Continuing Legal Education Society of British Columbia, Lawyers' Weekly, the Personal Tax and Estate Planning Journal, and others. She is a member of the Executive of the Estates and Trusts Section of the Ontario Bar Association. She holds a B.A. (High Distinction) and a J.D. from the University of Toronto and was called to the Bar of Ontario in 2005.

LEAVE A LEGACY ™

"You make a living by what you get, but you make a life by what you give."
Winston Churchill

LEAVE A LEGACY™ is a national public awareness program designed to educate and encourage people to leave a gift through their Will or any other gift planning instrument to a charity or not-for-profit organization of their choice. LEAVE A LEGACY™ does not solicit gifts for any particular organization. LEAVE A LEGACY™ is a donor-oriented education campaign to raise awareness of the importance of including a charitable gift in the estate planning process.

The Niagara Golden Horseshoe LEAVE A LEGACY™ Program is a region-wide program that aims to build local awareness of the benefits of making planned gifts that better those in our local community. The local program also aids in building partnerships between donors, charities and not-for-profit organizations and gift planning professionals such as estate planners, financial advisors, insurance professionals, accountants and lawyers.

A program of the Canadian Association of Gift Planners (CAGP-ACPDP™), LEAVE A LEGACY™ is a collaborative effort of donors, charities, not-for-profits and professional advisors. The LEAVE A LEGACY™ program's goal is to raise awareness of the importance of thoughtful, well-planned, tax-preferred gifts and their impact on the quality of life for everyone in our communities.

Currently, there are 32 LEAVE A LEGACY™ partners in the Niagara Golden Horseshoe Program. The following are our current LEAVE A LEGACY™ Partners:

The Aids Network
Alzheimer Society Niagara Foundation
Brock University
The Bruce Trail Conservancy
Burlington Art Centre
Burlington Community Foundation
Canadian Diabetes Association
Children's Aid Foundation of Halton
The Children's Aid Society of Hamilton
Foundation for Niagara & Hamilton area Christian Schools
Gillian's Place
Good Shepherd Centres
The Greater Niagara General Hospital Foundation
Hamilton Community Foundation
Hamilton Conservation Foundation
Hamilton Health Sciences Foundation
The HOPE Centre
Joseph Brant Memorial Hospital Foundation
Juvenile Diabetes Research Foundation
Lance Wiebe Professional Investment Services Inc.
Lupus Foundation of Ontario
Medical Ministry International
Niagara Community Foundation
St. Joseph's Healthcare Foundation
The Salvation Army
United Way of Burlington & Greater Hamilton
The Welland Heritage Council & Multicultural Centre
Welland Hospital Foundation
Wesley Urban Ministries
World Vision Canada
YMCA of Hamilton/Burlington/Brantford
YMCA of Niagara

VISIT leavealegacy.on.ca TO BECOME A PARTNER OR EMAIL US AT leavealegacygoldenhorseshoe@gmail.com TODAY!

Find CAGP & Leave A Legacy on facebook

2010 Conference Sponsors

Mackenzie INVESTMENTS

SB Partners
CAs and MORE™

Special Thanks to the Leave A Legacy™ National Development Sponsor.

The Great-West Life Assurance Company · London Life · Canada Life

STRONGER COMMUNITIES TOGETHER™

CAGP Niagara Golden Horseshoe Roundtable Conference Committee

Tamara Coleman-Lawrie
Conference Co-Chair & Leave A Legacy Program Chair
Director Resource Development
Wesley Urban Ministries

Patti Johnstone
Conference Co-Chair & Roundtable Secretary
Development Officer
Milton District Hospital Foundation

Nancy Handrigan
Roundtable Chair
Manager, Estate and Gift Planning
Joseph Brant Memorial Hospital Foundation

Lisa Gonnering
Roundtable Vice-Chair
Estate & Gift Planning Officer
St. Joseph's Healthcare Foundation

Mary Goodfellow
Roundtable Treasurer
Major Gifts Officer
Juvenile Diabetes Research Foundation

Mary Kay Aird
Roundtable Past Chair

Paulette Kinmond
Education Co-Chair
Senior Manager, Planned Giving
World Vision Canada

Brian Kon
Communications Chair
Executive Director
Hotel Dieu Hospital

Marla Nasello-Smith
Roundtable Registrar
Major Gifts & Leadership Giving Associate
United Way of St. Catharines & District

Illuminating the Fundraising Scope for Tomorrow

Tuesday, October 19th, 2010 • The Waterfront Centre at The Chamber

(555 Bay Street North, Hamilton, Ontario L8L 1H1 • Tel: (905) 522-1151)

CAGP Conference Registration Form

Please Register by Friday, October 1st, 2010 to receive Early Bird rate. Deadline for Registration: Friday, October 8th, 2010

How To Register

Online **OR** by Mail (cheque, VISA or Master Card) at: http://www.regonline.com/Niagara_Oct19

Cheque and registration form mailed to: Marla Nasello-Smith, Conference Registrar
United Way of St. Catharines & District
80 King St., Unit 3, Ground Floor, St. Catharines, ON L2R 7G1

Registration includes conference sessions, breakfast, lunch, refreshments and breaks as well as conference session materials and a prime networking opportunity at the Harbour View Reception.

Directions to The Waterfront Centre at the Chamber, go to link: http://thewaterfrontcentre.com/location.html

☐ First time attending CAGP Niagara Golden Horseshoe Fall Conference

Organization/Company Name: ______________________ Title: ______________________
(please indicate if you are a Board member and what organization)

Address: ______________________ City: ______________ Postal Code: ____________

Business Phone: (   ) ______________ Fax: (   ) ______________ Email: ______________________

Choose Your Workshop Sessions (maximum 3 per registrant)

10:00am - 11:00am Session 1

- 1A Gina Eisler: Stewardship for Today's Gift Planning Donor: Beyond Moves Management and Donor Walls
- 1B Kelly Sodtka: Capital Campaigns and Planned Giving - an Integrated Approach
- 1C Laura West: The Enforceability of Charitable Pledges and Restricted Charitable Gifts

11:15am - 12:30pm Session 2

- 2A Ian M. Fraser & Lisa Gonnering: Charitable Gift Annuities... Gifts that Give Back!
- 2B Karen Bjerland: Topping up an Advisor's Toolkit for Philanthropy
- 2C Léony deGraaf Hastings: Creating Meaningful Legacies through Life Insurance

1:45pm - 2:45pm Session 3

- 3A John Chisholm & Roy Sieben: Engage your Board with the Story Behind the Numbers
- 3B Lorne Jackson: Public Foundations
- 3C Adam D. Cappelli: Attacking a Will - Protecting Your Rights as Beneficiary

REGISTRATION FOR EACH CONFERENCE ATTENDEE IS REQUIRED IN ADVANCE. SEE CONFERENCE REGISTRATION REATES BELOW

Sample:	*John Smith*	*Director of Development* *Heart and Stroke Foundation*	*$110 (CAGP Member - Early Bird)*	*1A 2B 3C*
1.	Name of First Registrant	Title	Conference Fee	Workshop Selections
2.	Name of Second Registrant	Title	Conference Fee	Workshop Selections
3.	Name of Third Registrant	Title	Conference Fee	Workshop Selections
4.	Name of Fourth Registrant	Title	Conference Fee	Workshop Selections

Register by Friday, October 1st, 2010 and receive Early Bird rate!

Early Bird by October 1st

___ CAGP Member $110
___ Non-CAGP Member $130
___ Board Member/Fund Development Volunteer $50

After October 1st

___ CAGP Member $130
___ Non-CAGP Member $150
___ Board Member/Fund Development Volunteer $60

LEAVE A LEGACY ™

CAGP • ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONS PLANIFIÉS