Gift Planning Fundamentals Online 2026

AGENDA

Monday, October 26 (Day1)
and
Tuesday, October 27 (Day 2)

Monday, October 26, 2026:

Day 1

Timing according to time zones

9:00 a.m. – 1:15 p.m. PDT
10:00 a.m. – 2:15 p.m. MDT
10:00 a.m. – 2:15 p.m. CST
11:00 a.m. – 3:15 p.m. CDT
12:00 p.m. – 4:15 p.m. EDT
1:00 p.m. – 5:15 p.m. ADT

- Introduction
    - Why Gift Planning Fundamentals and what you'll learn
    - Strategic Gift Planning
    - Charitable landscape in Canada
    - Social Capital and Values-based planning
    - Personal Action Plan

- Key concepts
    - Primer on taxation and charity principles - glossary of terms
    - Tax treatment of a cash gift and net cost of gift

- Donor Conversations
    - Tips on getting the visit
    - Discovery questions
    - Learning the donor's story
    - Involving the donor's family
    - Practicing the conversation with donors regarding their interests (Group work)

- Types of Gifts

    - Gift Acceptance Policy

- Public Securities
    - Tax treatment of appreciated property
    - How PS gifts work
    - Issuing the Tax Receipt and other Administrative tips
    - Prospective donors
    - Marketing

- Charitable Bequests
    - Key points about bequests and bequest programs
    - Estate Tax basics and Estate Planning
    - Tax treatment of bequest gift
    - Bequest Administration
    - Talking to donors about bequests
    - Marketing Bequests
    - Recognizing, Tracking and Reporting on Bequests

- Practicing the conversation with donors regarding gifts in a will.
    - Case Study debrief

Tuesday, October 27, 2026

Day 2

Timing according to time zones

9:00 a.m. – 1:15 p.m. PDT
10:00 a.m. – 2:15 p.m. MDT
10:00 a.m. – 2:15 p.m. CST
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1:00 p.m. – 5:15 p.m. ADT

- Review of concepts from Day 1

- Gifts of Registered Funds
    - How they work
    - Prospective donors for gifts of Registered Funds
    - Tax treatment of gift of Registered Fund
    - Marketing and Administering Tips

- Gifts of Life Insurance
    - How they work
    - Advantages and disadvantages of LI gifts
    - Two common ways they work
    - Tax credits during lifetime
    - Tax credits for proceeds on deathExamples of tax treatment
    - Marketing insurance gifts
    - Administrative considerations

- Case study (groups)
    - Present Case Study by group

- Where donors can give
    - Private Foundations
    - Donor Advised Funds

- Involving Others

    - Working with Professional Advisors

- Session Wrap-Up & Reflection
    - Next Steps
    - Personal Action Plan
    - CAGP Resources