



CAGP Foundation Course Descriptions

As Canada's foremost educator in strategic charitable gift planning, the CAGP Foundation is committed to delivering the highest quality and most comprehensive education to fundraisers, professional advisors and senior decision makers who work with current and prospective donors to help them realize their philanthropic dreams. **See the highlights of our courses to help you decide which program is the right one for you.**

Advanced Canadian Gift Planning Summit

CAGP Foundation's Advanced Canadian Gift Planning Summit is an intensive immersion in the tax, legislative and philanthropic issues related to charitable giving. It builds on Canada's longest running and most authoritative course in charitable planning, the Original Canadian Gift Planning course.

This **one-day** summit is offered biennially as a pre-Conference session before CAGP's National Conference. It is intended to provide a high level educational opportunity for CAGP Members and other professionals. It is designed for experienced gift planners, financial, trust and legal advisors who are looking for the next level of skill and knowledge in the philanthropic application of individual and corporate taxation, trusts, estates and financial planning strategies with high net worth donors / clients / philanthropists.

Bequest Administration Essentials

Delivered online over four two-and-a-half-hour sessions by a faculty team of experienced professionals in Canada on Charitable Bequest matters. This learning experience offers lectures, homework, group work, handy tip sheets, useful checklists, and in-depth case studies to help you gain a deep understanding of both the legal and technical, as well as the soft skills necessary for great bequest administration.

Some of the topics covered:

- Comprehensive outline of the steps in the administration process
- Gift Acceptance
- Due diligence review of estate accounts
- Acceptable requests & form of Release
- Communicating concerns or questions to the Estate Trustee
- Charities' rights and responsibilities
- Litigation
- Specific vs. residual bequests
- Donor Advised Foundations



Gift Planning Fundamentals

Whether you are new to gift planning or you are in need of a solid refresher, Gift Planning Fundamentals is a **one-day introductory course** that covers the basics to get your feet wet. After taking this course you will have learned about:

- basic tax concepts about charitable gifts,
- the most common types of planned gifts in Canada (there is not sufficient time to cover all vehicles) and some operational and marketing considerations for each of the vehicles
- how to have a discovery conversation with donors.

This course will provide you with an overview to get you started on the right path, but does not provide the toolkit to start a gift planning program, nor the in depth comprehensive gift conversations. If you are already along that path you should consider one of the following two courses.

CAGP also offers this course in completely French and a version for Professional Advisors.

Strategic Gift Planning Bootcamp for Major Gift Professionals

Professionals working in the development space, Major Gift Professionals or Leadership Annual Gift Professionals, Executive Directors, those with three to five years of experience know that a donor-centric approach to fundraising has you engaging with donors who are fully committed and have financial capacity, but perhaps they tell you the gift cannot be made today or in the near future. The **three-day** Strategic Gift Planning Bootcamp will equip you with:

- hands-on learning how to introduce gift planning and blended (current and future) gift options
- practical skills and knowledge regarding gift planning vehicles
- tools to identify who is a good prospect for a planned gift
- tips on working with donors and donor visits.

This course is designed for experienced fundraisers who want to be able to have more comprehensive gift conversations with donors and their advisors. The knowledge gained will allow you to maximize service to your donors while also optimizing current and future revenue for your organization.

For those who want to learn how to set up a program, establish gift acceptance policies, marketing and the technical aspects of gift planning please look into the CAGP Original Canadian Gift Planning course.



Original Canadian Gift Planning Course

The Original Canadian Gift Planning course is the longest-running and the most regarded course available on strategic philanthropy in Canada. Charity based fund-raisers or consultants with at least two years of fundraising experience and/or who oversee or are responsible for, gift planning will benefit from this comprehensive **five-day** course. There have been many professional advisors who have benefited from the course material and the in-depth experience of learning alongside their charity counterparts. The Original course provides in-depth education on the full range of strategic gift planning issues:

- the application of key gift planning vehicles (understanding the vehicle, its tax implications and donor profile)
- identify who are the best prospects for planned giving in your database
- hands on learnings how to introduce gift planning options
- tips working with donors and effective donor visits
- how to set up and manage a gift planning program
- proven strategies and tactics for marketing planned gifts to your donors and communities
- donor stewardship
- gift planner ethics.

This course provides an unrivaled educational experience, balancing formal classroom learning, in-depth discussions, group work, and case studies, while always incorporating adult-learning principles.

For more information about these courses visit www.cagp-acdp.org or
contact education@cagp-acdp.org.