



**Gift Planning Fundamentals Online 2026
October 26-27, 2026**

Timing According to Time zone

**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**

AGENDA

**Monday, October 26, 2026:
Day 1**

- 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



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Monday, October 27, 2026:

Day 2

- 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 death
 - Examples 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