CAGP FOUNDATION

Online Gift Planning Fundamentals for Professional Advisors – Empowering Client Philanthropy 2026

AGENDA

Monday, November 2 (Day 1)
and
Tuesday, November 3 (Day 2)

Timing according to time zones

8:00 a.m. – 12:00 p.m. PST
9:00 a.m. – 1:00 p.m. MST
10:00 a.m. – 2:00 p.m. CST
11:00 a.m. – 3:00 p.m. EST
12:00 p.m. – 4:00 p.m. AST

Day 1 - Monday, November 2, 2026

Introduction
- Gift Planning Fundamentals: Overview of the Day
- Personal learning objectives
- Charitable and advisor landscape in Canada
- Having the Philanthropic Conversation with Clients
- What's in It for Clients?
- What's in It for You?

How: Preparing You
- Primer on donation taxation and charity principles
- Tax treatment of a cash gift and net cost of gift
- Trigger events and client prospecting
- Practicing having client conversations (group discussion)

What: The Gift Planning Vehicles – Part 1
- Publicly listed securities
- Flow-Through Shares
- Private Company Shares
- Charitable Bequests
- Practicing bequest conversation with clients (group discussion)

Day 2 - Tuesday, November 3, 2026

What: The Gift Planning Vehicles – Part 2

- Gifts of Registered Funds
- Gifts of Life Insurance
- Charitable Gift Annuities
- Gifts in Kind

Where: Where can clients legally give?

- Charities, Foundations and Donor Advised Funds
- Crowdfunding, social-good projects and nonprofits

Case Study Work - Group

How: Empowering Philanthropy

- Getting started
- Roadblocks and obstacles
- Working with charities
- Incorporating philanthropy in your practice
- Getting connected to the charity ecosystem in your region
- The MFA-P designation

Conclusion

- Final thoughts
- Personal Action Plan
- CAGP and your business