Original Canadian Gift Planning Course

AGENDA

February 1-5, 2027

Delta Hotels Kingston Waterfront, Kingston, Ontario

Monday, February 1	
1:00 p.m. – 1:30 p.m.	Register in the classroom
1:30 p.m. – 2:15 p.m.	**Welcome & Orientation** Meet the faculty and peers who are in attendance with you and go over how to fully benefit from your time at the Original Canadian Gift Planning Course
2:15 p.m. – 3:00 p.m.	**Chapter 1: What is Strategic Gift Planning?** This area will align delegates around the definition of Strategic Philanthropy and cover some areas around shifting fundraising focus from only cash to accepting donations of assets, transactional fundraising vs. Social Capital conversations and the current landscape of the charitable sector in Canada.
3:00 p.m. – 3:30 p.m.	Break
3:30 p.m. – 6:00 p.m.	**Chapter 2: Tax Aspects and Gifts of Cash** Introduction to tax system in Canada and how charitable donations can reduce taxes payable, creating opportunities for clients/donors to plan their giving for maximum impact. **Concepts Followed by a Quiz!**
6:00 p.m. – 7:00 p.m.	Dinner
7:00 p.m. – 8:00 p.m.	Welcome Reception (Courtesy of CAGP Foundation) Pop by for a beverage and an opportunity to chat with your faculty and fellow attendees in a casual setting.

Tuesday, February 2	
7:00 a.m. – 8:30 a.m.	Breakfast
8:30 a.m. – 8:45 a.m.	**Chapter 2: Tax Aspects and Gifts of Cash (Review)** Quick review and a chance to ask any pressing questions.
8:45 a.m. – 9:45 a.m.	**Chapter 3: Bequests and Administration** Benefits of charitable bequest for donors and charities. Explanation of what an Estate is, how they are administered, and how taxes are levied after death. Tax advantages of a charitable gift from a will, both cash and securities.
9:45 a.m. – 10:00 a.m.	Break

10:00 - 11:45 a.m.	**Chapter 3: Bequests and Administration**, continued
11:45 a.m. – 12:00 p.m.	Group Photo
12:00 p.m.– 1:00 p.m.	Lunch
1:00 p.m. – 1:30 p.m.	Review of the morning session
1:30 p.m.– 2:45 p.m.	**Chapter 4: Recognition and Stewardship** The elements of recognition and stewardship, and reasons why they are essential, especially in gift planning. Ways to keep the stewardship program healthy and relevant over time.
3:00 p.m.– 3:15 p.m.	Break
3:15 p.m.– 4:15 p.m.	**Chapter 5: Marketing Your Gift Planning Program** Creating a marketing plan, including prospect identification encouraging hand-raisers, and reviewing various marketing tools available. **Please bring your own gift planning material to share with peers.*
4:15 p.m.– 5:45 p.m.	**Marketing Assignment** Groups will all receive the same marketing case, providing an opportunity to apply concepts from the course and past professional experience. Reporting from each group, will allow for a sharing of key points and approaches.
5:45 p.m. – 6:30 p.m.	Dinner
6:30 p.m.	Free Time

Wednesday, February 3	
7:00 a.m. – 8:30 a.m.	Breakfast
8:30 a.m. – 8:45 a.m.	Review of the Tuesday afternoon Session
8:45 a.m. – 10:30 a.m.	**Chapter 6: Gifts of Publicly Listed Securities** Overview of the tax incentives when donating gifts of public securities, gift administration, and issuing receipts. Strategies for marketing and working with advisors and institutions.
10:30 a.m. – 10:45 a.m.	Break
10:45 a.m. – 12:00 p.m.	**Chapter 7: Endowments, Foundations, Donor Advised Funds (DAF'S) and Working with Professional Advisors** Endowments and their uses, pros and cons; flexible options for creating endowments; endowment considerations; and encouraging endowment gifts. We will look at the different ways philanthropists use Foundations for their giving and explore the many types of Foundations, including Public, Private, Community, and Donor Advised. Gifts of assets require collaboration with advisors, how should charities of all sizes work with this gift planning partner? We will address common ethical concerns and share

	CAGP research on "the philanthropic conversation", the business of philanthropy (including the emergence of online wills) and data from the Will Power We will also share insights on the MFA-P; Master Financial Advisor in Philanthropy.
12:00 p.m. to 12:30 p.m.	**Review & Quiz on Morning Topics!**
12:30 p.m.– 1:15 p.m.	Lunch
1:15 p.m. – 2:00 p.m.	Free Time
2:00 p.m. – 3:45 p.m.	**Chapter 8: Gifts of Life Insurance** Introduction to life insurance and how it can be used to make gifts to charities. This includes various models and benefits to each.
3:45 p.m. – 4:00 p.m.	Break
4:00 p.m. – 5:45 p.m.	**Chapter 9: Cultivation, Solicitation & Closure** Principles and techniques of cultivation, relationship building and solicitation. How to get the visit, make it productive. Tips on the challenges that can derail a gift, and the things that need to be done closing the gift. This section will also include some information on current and future giving models, better known as a 'blended gift'
	Review & Trivia on Afternoon Topics!
6:00 p.m.– 7:00 p.m.	Dinner
7:00 p.m.– 8:30 p.m.	Evening Discussion **Chapter 10: Ethical and Liability Issues** Examine the role that ethics plays in gift planning through ethically challenging gift-planning scenarios and the CAGP Code of Ethics. You will be encouraged to submit anonymous questions during the week. *This is a safe space.*

Thursday, February 4	
7:00 a.m. – 8:30 a.m.	Breakfast
8:30 a.m. – 8:45 a.m.	Review prior day (15 mins)
8:45 a.m. – 9:15 a.m.	**Chapter 11: Gifts from Registered Funds (RRSP, RRIF, TFSA)** Review the different ways registered funds can be donated and how to maximize this giving vehicle.
9:15 a.m. – 10:00 a.m.	**Chapter 12: Managing a Gift Planning Program** Program design solutions for charities of all sizes, whether starting a program or reactivating a dormant one. Not one size fits all, we'll talk about what your organization and team needs, and capacity/budget to make it real. Tips on Bequest management, estate donation income tax receipting and program administration will be a special focus.
10:00 a.m. - 10-:15 a.m.	Break

10:15 a.m.-11:00 a.m.	**Chapter 12: Managing a Gift Planning Program, continued**
11:00 a.m.– 12:00 p.m.	**Case Study – Donor Conversation** Meet Arujuna & Preeti and discuss at the tables, discussion as a larger group will follow.
12:00 p.m.– 1:00 p.m.	Lunch
1:00 p.m.– 2:00 p.m.	**Course Review & Trivia!**
2:00 p.m.-3:00 p.m.	Review Quiz, explain Assignment 5
3:00 p.m. - 5:15 p.m.	Groups convene to work on Assignment #5
5:45 p.m.	Meet in the hotel lobby to walk to the off-site restaurant for dinner.
6:00 p.m.	Off-site dinner: Chez Piggy Restaurant & Bar, 68 Princess St, Kingston, ON K7L 1A5 or Atomica, 71 Brock St., Kingston, ON K7L 2Z9

Friday, February 5	
7:00 a.m. – 8:00 a.m.	Breakfast & check out (Bring your luggage to the classroom or leave it with the front desk)
8:00 a.m. – 10:00 a.m.	Assignment #5: Culminating Case Study presentations
10:00 a.m. – 11:00 a.m.	Parking Lot Topics, Closing Remarks and Completion Certificate Presentation
11:00 a.m.	Boxed Lunches will be available

**Note: The agenda is subject to change*