Gift Planning Fundamentals

Agenda

Morning (8:00 a.m. – 12:30 p.m.)

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

- 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

BREAK: 10:05 – 10:25

- Types of Gifts
    - Gift Acceptance Policy

- Publicly listed securities
    - Tax treatment of appreciated property
    - How PLS 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 (includes probate)
    - 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 (Group work)

LUNCH: 12:30 – 1:15

Afternoon (1:15 p.m. – 5:00 p.m.)

- Check-in
    - Case study
    - Personal action plan

- 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

- Work on Case Study Project in Groups

BREAK: 3:00 – 3:20 p.m.

- Present Case Study Solutions by Group

- Where to Donate
    - Direct to Operating Charity
    - Through Donor Advised Fund
    - Through Private Foundation

- Involving Others
    - Working with Professional Advisors

- Wrap Up

- Personal Action Plan