

# Presentation Series 2017 - 2018

The CAGP Greater Vancouver Area Chapter meetings provide high-quality presentations and networking opportunities for representatives from the charitable sector as well as estate and financial planning professionals. Meetings are open to members and non-members. A discount is available to members.

**Thursday, Sept 21, 2017** 7:30 – 9:30 am

## Tax Planning, Insurance and your donor

**Brenda McEachern, Canada Life**

This session has something for everyone - financial advisors, lawyers, fundraisers. Brenda is an estate lawyer and tax planning consultant who helps advisors develop advanced estate plans for clients in the business and affluent markets. In consultation with allied professionals, she develops proposals focusing on generational wealth transfer, tax-efficient investment and insurance strategies, asset protection and philanthropy.

**Tuesday, Oct 10, 2017** 7:30 - 9:30 am

## Effective Transition of Family Wealth and Values

**David Sung, CEO Nicola Wealth**  
**Janice Loomer-Margolis, JLM Philanthropy**

David and Janice will present a session that is suited for fundraisers as well as advisors drawing on their depth of experience, they will integrate ideas on financial succession and estate planning with ideas on the transmission of values. They will also address how a fundraiser may be involved in conversations related to these processes.

**Thursday, Jan 18, 2018** 7:30 – 9:30 am

## Trends in Philanthropy

**Paul Nazareth, VP Community Engagement, Canada Helps**

What are the trends in philanthropy we can't ignore? How will this affect your charity, your role as a fundraiser. And as advisers in law, accounting, insurance and finance we'll discuss how clients are engaged in these trends and how to address the needs of your clients while still creating responsible social impact. What is a fad and what are facts?

**Thursday, Feb 15, 2018** 7:30 - 9:30 am

## Estate Administration & the role of an Executor

**Karen Brown, LLB, Director Planned Gifts, St Paul's Hospital Foundation**  
**Geoff White, LLB, Clark Wilson**

What should you look for when an estate gift is received by a charity? What is the role of an executor? Geoff and Karen will explore the estate gift both from the perspective of the executor and the charity. What do they need from each other, what are their expectations, and what are the common pitfalls of the estate & charitable beneficiary relationship through-out the course of an estate administration.

**March 2018**

## Half Day Workshop

Date, location and topic TBD

### Start Times

Unless otherwise noted, the meeting times are:

- 7:30 a.m. Breakfast and Networking
- 8:00 a.m. Program begins
- 9:30 a.m. Presentation ends

### Location

Unless otherwise noted, the meeting location is:  
Terminal City Club, 837 West Hastings Street, Vancouver

### Pricing *all applicable taxes included*

Unless otherwise noted, the cost for each session is:  
Member rate: \$40 per meeting. Non-Member rate: \$56 per meeting.

### To Register

Registration opens on the Greater Vancouver Area Chapter Website approximately one month before each event.

Eligible for CFRE Education credits



# CAGP GREATER VANCOUVER CHAPTER

*A better world through strategic charitable giving...*

## Other Professional Development Opportunities

**Tuesday, Nov 28, 2017**      **5:30 - 8:00 pm**  
**Joint Meeting: CAGP Greater Vancouver Area Chapter and the Vancouver Estate Planning Council**

Location: Law Courts Inn, 800 Smithe Street, Vancouver BC

**April 11-13, 2018**  
**2018 CAGP National Conference**  
**Location: Winnipeg, MB**

For conference details see [www.cagpconference.org](http://www.cagpconference.org)

**Thursday, May 17, 2018**      **7:30 - 9:30 am**  
**Joint CBA/CAGP Session**

Location and Presentation TBD

## How to join CAGP

On the web [www.cagp-acdp.org](http://www.cagp-acdp.org)  
By phone 1-888-430-9494

Greater Vancouver Area Chapter Website:  
[www.cagp-acdp.org/en/chapter/greater-vancouver](http://www.cagp-acdp.org/en/chapter/greater-vancouver)

Annual CAGP Associate membership fee \$375  
Annual CAGP Associate Nonprofit membership fee \$325  
Annual student fee \$85  
Annual Charity/Nonprofit Organization membership fee  
4 member = \$1,000, 5-10 member add \$250 each, 10+ members add \$200 each  
Annual Small Nonprofit Charity membership \$150  
Annual Retiree membership \$85

For full membership details and application go to:  
[www.cagp-acdp.org/en/membership-categories-fees](http://www.cagp-acdp.org/en/membership-categories-fees)

For more information on the CAGP Greater Vancouver Area Chapter Presentation Series, contact:

Carmen Murphy  
604-331-4832  
[cmurphy@vancouveropera.ca](mailto:cmurphy@vancouveropera.ca)



# CAGP GREATER VANCOUVER CHAPTER

*A better world through strategic charitable giving...*

