



CAGP PRESENTATION SERIES 2020-2021

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.

OCTOBER 2020

Planned Giving Debate: Donors in Their 30s and 40s: Untapped Gold Mine or Waste of Time?

Debaters: Fraser Green and Rory Green
Thursday, Oct 29, 2020

Zoom Presentation
10:00 - 11:00 am

New Canadian research from CAGP suggests planned giving efforts are overlooking people in their 30s and 40s. But in unprecedented times when resources are tight, is this a group we can afford to focus on? Or are our resources better focused on people making and revising wills in their 60s and 70s?

NOVEMBER 2020

"What are they thinking": Understanding Chinese Canadian Gift Planning

Speakers: Candice Tsang and Charlene Taylor
Thursday, Nov 19, 2020

Zoom Presentation
10:00 am - 12:00 pm

Chinese Canadians make up over 20% of the Population of the Lower Mainland and are having a growing impact on our philanthropic community. Increasingly, Planned Gift Officers are interested in knowing more about the motivations, aspirations and charitable mindset of this important group.

JANUARY 2021

Integrated Giving: Major Gifts and Planned Giving - How to engage, inform and empower your donors about major and planned gifts to support your mission - today and into the future!

Speaker: Grant Monck
Thursday, Jan 21, 2021

Zoom Presentation
10:00 - 11:00 am

This session will discuss the solicitation of major gifts from individuals including gift planning approaches and techniques under one giving umbrella. A foundation for this work is the development of a donor centered approach with a unified fundraising team at your organization to solicit both current and future gifts. Additional topics to be covered include distinguishing between gifts of cash and assets, donor prospect research in this area and how to present this type of structured gift to individuals. The session will end with a perceptual snapshot exercise for attendees to apply the session to their own fundraising shop.

FEBRUARY 2021

Tackling Workplace Harassment: Name It, Solve It and Thrive

Speaker: Beth Ann Locke
Thursday, Feb 18, 2021

Zoom Presentation
10:00 am - 12:00 pm

Bullying, harassment and sexual harassment have no place in the workplace. And yet, each finds plenty of ease to grow in some organizations. In truth, all forms of harassment can kill individual and team performance, depress revenue and donations, and destabilize workplaces. In this presentation, Beth Ann Locke will talk about identifying these specific problems, how to address them if you are the target or you are a manager, ways to solve aspects of "harassment culture", how to thrive - and when you'll know that leaving is your best option. She will also address the unique issues which may arise for staff working with planned giving donors.

MAY 2021

Donor Advised Funds - Life and Death

Speakers: Calvin Fong and Liz Moxham
Thursday, May 20, 2021

Zoom Presentation
10:00 - 11:00 am

You likely have all heard of Donor Advised Funds (DAFs), but do you understand the legal implications of creating a DAF and how a DAF can be incorporated into a donor's planned giving? In this session, we will work through a DAF case study following the life and death of a donor, beginning with a donor wanting to establish a DAF as a planned giving vehicle through to her death (and beyond). Of interest to charities and professional advisors alike, we will discuss issues such as (i) what a DAF is, at law; (ii) the implications of creating a DAF both for the donor and for the charity that might otherwise have been receiving direct gifts from the donor; (iii) how donors and charities work with DAFs; and (iv) what happens upon the death of a donor, among others. Bring your questions!

Joint Event with the Charities and Not-for-profit Organization Section of the Canadian Bar Association, BC Branch

EVENT DETAILS

Start Times

Unless otherwise noted, the meeting times are 10:00 am to 11:00 am

Location

Unless otherwise noted, all presentations will be held online on Zoom

Cost

\$10 for CAGP members
\$20 for non-members and guests

Bursaries Available:

https://docs.google.com/forms/d/e/1FAIpQLScIMQWx75zlr37TjGKqZNBdpwllzwnr87X8E67GMIMhfDYdfg/viewform?usp=sf_link

HOW TO JOIN CAGP

On the web www.cagp-acpdp.org
By phone 1-888-430-9494

Greater Vancouver Area Chapter Website:
www.cagp-acpdp.org/en/chapter/greater-vancouver

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

For full membership details and application go to:
www.cagp-acpdp.org/en/membership-categories-fees

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

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CAGP GREATER VANCOUVER AREA CHAPTER

A better world through strategic charitable giving...