

CANADIAN ASSOCIATION OF GIFT PLANNERS VANCOUVER ISLAND CHAPTER

CAGP Vancouver Island WEBINAR WEDNESDAY Program 2021 – 2022

In view of the ongoing challenges with COVID we plan on combining National Webinars with live in-person events commencing in January 2022. We will release more information on live events closer to the planned dates. Sessions are eligible for CFRE credits.

Wednesday, October 27, 2021 - 10:00am – 11:00 am

Unraveling the New Path for Estate Planning

Sharon Hartung, Captain (Ret'd), PEng, TEP

This session is about digital assets in the context of the digitization of the entire global estate industry. The implication is threefold and understanding these digital drivers of change, and where they fit into the broader landscape of the estate industry, is significant. It will help you position where to start, in terms of what makes business sense where your firm, organization or profession should participate digitally, or where you need to position yourself to remain competitive.

Wednesday, November 24, 2021 - 10:00 am – 11:00 am

A Gift of Inclusion? Immigrant Philanthropists on Doing Giving Right

Krishan Mehta, Ryerson University

In this session, Krishan Mehta will draw on academic research and practical examples that will shed light on the important role immigrants can play in strengthening your organization's mission – and how you can nurture lasting relationships with this generous population.

Wednesday, January 26, 2022 - 10:00 am – 11:00 am

Staying Out of Trouble: Keeping estate and life insurance gifts on the right side of the tracks

Margaret Mason, Norton Rose Fulbright LLP & Kevin Wark, LL.B, CLU, TEP, Conference for Advanced Life Underwriting (CALU)

Join us for a panel discussion with Kevin Wark and Margaret Mason for an in-depth discussion of current practices in the insurance and legal aspects of philanthropic planning, and learn how you can ensure that you, your clients, and your donors can ensure that everyone is staying safely on the right side of the tracks.

Wednesday, February 23, 2022 - 10:00 am - 11:00 am

Broad Based Marketing for Gift Planning

Brady Hambleton, CM & Allen Davidov, MBA, CM - Canadian Marketing Association's Not-For-Profit Council

This session will benefit charitable gift planning and marketing teams, and will help to answer the following key questions: What does today's multi-channel marketing funnel look like for charities and not-for-profit organizations? What role does data and insights play in the successful design and execution of an integrated marketing and fundraising campaign? and how can this help to transform your legacy pipeline?

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Wednesday, March 30, 2022 - 10:00am – 11:00 am

Engaging with Older and Vulnerable Clients

Raphael Tachie, TD Bank Group

This presentation will review the emerging legislative and regulatory landscape relating to the treatment of older and vulnerable clients and explore some ideas about how advisors and gift planners may deal with older and vulnerable clients in the new landscape.

Wednesday, May 25, 2022 - 10:00am – 11:00 am

Legacy Glitter & Donor Lifelines: Inspiration And Ideas For Looking After Your Precious Legacy Donors

David Love, Jen Love & John Lepp - Agents of Good

Join Agents of Good David Love, Jen Love and John Lepp for an engaging session sharing dazzling case studies, ideas and inspiration you can implement right now and into your bright fundraising future. As you fill your lifeline with marvelous donors, we'll discuss the art and science of looking after them today and forever. You'll learn about best practices and how to develop your own imaginative ways forward.

Wednesday, June 29, 2022 - 10:00am - 11:00 am

Ask the Advisor – A year in review

DeWayne Osborn, CPA, CGA, CFP, MFA-P, Cardinal Capital Management

DeWayne will outline the Ask the Advisor requests over the past 12 months, discuss frequency of requests, what are the most popular topics, what sort of turn around you can expect, and how to more efficiently use this unique resource for CAGP members. If you have a gift acceptance or tax related question, feel free to ask it then!

IN PERSON Programming 2021 – 2022

Hosted at the Union Club

Wednesday, January 19, 2022 - 12:30 pm - 1:30 pm

Charities Round-table Discussion

Moderated by Beth Cairns, Chair CAGP Vancouver Island

March TBA

CAGP and Victoria Estate Planning Council

Moderated by Gordin Larin

Join us for a discussion featuring a Charity Leader and Financial Advisor reviewing an actual planned giving case.

April 6 - 8, CAGP Conference

Rise Again - Navigating the Future

Halifax, Nova Scotia

Wednesday, May 18, 2022 - 12:30 pm - 1:30 pm

Gifts of Land and Practical Tax Considerations

Michelle Johnson, Wilderness Committee and Grant Monk

Wednesday, June 15, 2022 - 12:30 pm - 1:30 pm

Social Lunch

Members to come prepared to chat about their biggest challenge and biggest success this past year.

CAGP Vancouver Island Chapter Executive

Chair - **Beth Cairns**, Victoria Hospitals Foundation

Vice Chair – **Vacant**

Treasurer - **Greg Kuhn**, University of Victoria

Communications Chair - **Vacant**

Programming Chair – **Rod Abbott**, Assante Wealth Management and **Gordon Larin**, First Peoples' Cultural Foundation

Membership Chair - **Jane Evans**, BC Cancer Foundation

Executive Secretary – **Alyson Dahl**, Camosun College

Director at Large - **Laurie Bienert**, Nanaimo Foundation

Director at Large - **Shelley Engelhardt**, Victoria Hospice

