CANADIAN ASSOCIATION OF GIFT PLANNERS VANCOUVER ISLAND CHAPTER

LUNCH & LEARN AND MORE!

2016 – 2017

The CAGP Vancouver Island Chapter *Lunch & Learn* provides high-quality presentations and networking opportunities for CAGP members, non-members and professional advisors.

Wednesday, September 7, 2016

4:30 pm – 6:00 pm

20th CAGP Anniversary Reception

Please join us to mingle and mix and celebrate 20 years of CAGP on Vancouver Island!
Government House, Cary Castle Mews Tea House
By Invitation Only, RSVP Required – No Charge
Beverages and appetizers complimentary of CAGP VI

Monday, October 24, 2016

12:00 pm – 1:30 pm (registration at 11:45 am)

The Simple Key to Success: Learning Your Donor or Client's Story

Janice Loomer Margolis, Philanthropy Advisor

Janice will share her considerable knowledge and expertise gained from many years in the charitable sector. This session will provide the rationale, process and tips for you to learn your donor or client's story. She will also use an exercise so that folks will actually use their learning to make it stick.

Tuesday, November 22, 2016

12:00 pm – 1:30 pm (registration at 11:45 am)

Win-Win-Win Canadian Style: Achieving Dynamic Integration with Fundraising Colleagues

Cheryl Hebb, CFRE, Director of Development, UVic
Deborah Walker, Manager, Planned Giving & Estate Administration, UVic

Let us help you develop productive relationships between gift planners and other fundraising professionals, build team performance, and increase both planned giving expectancies and current gifts. You will learn how to work with fundraising colleagues as they expand their portfolios, assist annual and major gift fundraisers in obtaining planned gifts, and help market multiple gift options to donors. These 'blended asks' increase support for your cause and enhance your organization's mission. In the end, everybody wins!

Wednesday, February 8, 2017

11:00 am – 2:30 pm (registration at 10:45 am)

Estate Accounting: It's All in the Details

Roger Lee, LL.B., DLP Piper (Canada LLP)
Yolanda Benoit, Senior Manager, Gift Planning, BC SPCA

This presentation will give participants the knowledge and tools to allow you to confidently review executor's or administrator's accounts on your own. It will start with the basics and move to more complex considerations in reviewing accounts, including the evaluation of executor's remuneration and issues with common form of releases that charities are often asked to sign.

Wednesday, March 8, 2017

12:00 pm – 1:30 pm (registration at 11:45 am)

Nine Actions to Increase Legacy Gifts

Gwen Chapman, Principal, DonorFocus 360

Many organizations recognize that Legacy Gifts can provide long-term financial stability. But do they have a plan to increase Legacy Gifts? Do YOU have a plan? Whether you have an established planned giving program or are starting a program, implementing these nine actions will have an immediate impact on your ability to increase the number and value of Legacy Gifts.

Presentation series events are held at the Union Club of BC, 805 Gordon Street, Victoria (unless otherwise noted)
Pricing (*all applicable taxes included*)
Unless otherwise noted, the cost for each session is:
Members $25 | Non-Members $35
Each session over the lunch hour includes a hot served lunch
Online reservation available at:
www.cagp-acpdp.org/en/chapter/vancouver-island-victoria

March 29 – 31, 2017

Don't forget the 24th Annual CAGP National Conference, held in Toronto, Ontario

*Stay tuned for bursary opportunities

Tuesday, April 11, 2017

12:00 pm – 1:30 pm (registration at 11:45 am)

Joint meeting with the Victoria Estate Planning Council

Adding Value to the Philanthropic Conversation

Ruth MacKenzie, Executive Director, CAGP

For both charities and financial advisors, relationships with donors/clients are key. Deeper relationships lead to larger charitable gifts *and* more business. In this session, you'll learn about the research initiative by CAGP to assess the potential for advisors to lead philanthropic discussions with high, net-worth clients. The CAGP study explored giving behaviours, the incidence and nature of conversations on philanthropy, as well as barriers and benefits of the philanthropic conversation for both advisors and high, net-worth individuals. The presenter will share tips and strategies on how to launch those discussions and connect with your clients' values in a way that will drive their philanthropic giving and strengthen your relationship.

May is LEAVE A LEGACY™ Month

LEAVE A LEGACY ™

*Stay tuned for more information about Leave a Legacy™ month

Wednesday, June 7, 2017

4:00 pm – 6:00 pm (registration at 3:45 pm)

Beverages and appetizers will be served

Annual General Meeting |

Women, Wealth and Philanthropy

Kirsty Thomson, Financial Advisor, Willow Wealth Management

Women control more wealth today than ever before, a trend that is expected to continue. How do we ensure that philanthropy becomes a consistent discussion point by industry professionals with their clients and/or donors? Hear from Kirsty Thomson, a Financial Advisor with Willow Wealth Management at Raymond James Ltd., who will share her approach on helping clients establish a personal giving policy as part of the financial planning process. Expect to learn what a Personal Giving Policy is, why it is important, and how to write one.

For other upcoming events, webinars, and educational opportunities sponsored by CAGP National, please visit: www.cagp-acpdp.org

HOW TO JOIN CAGP

CAGP HAS A NEW MEMBERSHIP STRUCTURE TO MEET YOUR NEEDS. FOR MORE INFORMATION:

ON THE WEB:
www.cagp-acpdp.org

BY PHONE:
1.888.430.9494

FOR MORE INFORMATION ON CHAPTER MEMBERSHIP OR THE PRESENTATION SERIES, CONTACT:

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