

CANADIAN ASSOCIATION OF GIFT PLANNERS VANCOUVER ISLAND CHAPTER

LUNCH & LEARN AND MORE!

2018 – 2019

The CAGP Vancouver Island *Lunch & Learn* sessions provide high-quality presentations and networking opportunities for CAGP members, non-members and professional advisors. Sessions are eligible for CFRE credits.

Monday, September 10, 2018
CAGP's Annual Mix & Mingle

**MIX AND
MINGLE**

Moxie's Grill & Bar, 1010 Yates Street

4:00 pm – 6:00 pm **RSVP Required – No Charge**

Please join us to mingle and mix and celebrate the new program season – bring a guest and introduce them to our Chapter. Appetizers and one beverage provided compliments of CAGP Vancouver Island.

Wednesday, October 3, 2018

12:00 pm – 2:00 pm (registration at 11:45 am)

Thriving as a Fundraiser in Work and Life

Diane Lloyd, Inspired Results Group

Join us for this inspiring session and focus on YOU for a change. You will learn the best coaching 'secrets' to mastering your mindset, reducing stress, maximizing your strengths and setting goals in a way that inspires and energizes you to achieve more, without feeling overwhelmed and burned out. You will leave with a framework to create your personal 'thriving' plan to take control of your life and show up at your best at work.

Strategic Gift Planning Bootcamp



October 23 – 26, 2018

Victoria, British Columbia

Faculty: Michelle Osborne & Sara Neely

Wednesday, November 14, 2018

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

**Generously sponsored by Frank Arnold,
Generational Wealth Management at Raymond James
Gift Planning for Revolutionaries. Your Will; Your
Final Act of Rebellion**

Michelle Johnson, Vice-Chair, CAGP Vancouver Island
Will and estate planning doesn't need to be stuffy, but rather your greatest – and final – totally legal act of resistance! This session will help gift planners channel their own inner wild child and incite others in kind. The intended result of this session is to continue an emerging conversation about how gift planning and activism go hand in hand.

Friday, November 16, 2018

National Philanthropy Day

Hosted by the Association of
Fundraising Professionals

For details visit: afpvancouverisland.afpnet.org



Monday, December 3, 2018

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

The World of Unusual Gifts

Does your gift acceptance policy take into consideration some of the unusual and uncommon gifts that donors want to give to your organization? How do you evaluate a human skull, for instance, and does it even qualify for a charitable tax receipt? Join us for an entertaining panel discussion on some of the weird and wonderful gifts that six local charitable organizations have been the recipients of.

Wednesday, January 9, 2019

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

Estate Administration & the Role of an Executor

Charlotte Salomon, McConnan Bion O'Connor & Peterson
Natasha Benn, Victoria Foundation

What role does an Executor have to fulfill in their fiduciary duties when administering an estate and what are the expectations of the beneficiary (charitable or otherwise)? This presentation will explore the estate gift from the perspective of both 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 and charity beneficiary relationship throughout the course of an estate administration.

Presentation series events are held at the Union Club of BC, 805 Gordon Street, Victoria
Pricing (*all applicable taxes included*)
Unless otherwise noted, the cost for each session is:
Members \$35 | Non-Members \$50
Each session held over the lunch hour includes a buffet lunch. Online reservation available at:
www.cagp-acpdp.org/en/events/upcoming

Wednesday, February 13, 2019

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

How to Engage Millennials in Philanthropy

John Bromley, President, CHIMP

Millennials have faith in charity, and they want to give more. They're more engaged on social media than any other age group, and they volunteer more than anyone else. **BUT** they also give less than any other age group. John will provide insight into the long-term decline in charitable giving and the impact Millennials could have on the State of Giving in Canada, good and bad. This presentation will offer a dive into the Millennial mindset; looking at what's keeping them from reaching their full charitable potential, what they think gift planning ought to be about, and what you can do about it.

Tuesday, March 12, 2019

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

Joint meeting with the Victoria Estate Planning Council Tax Planning, Insurance and your Client

Brenda McEachern, RBC Wealth Management

This session has something for everyone – financial advisors, lawyers, fundraisers. In consultation with allied professionals, Brenda develops advanced estate plans and proposals for clients in business and affluent markets with a focus on generational wealth transfer, tax-efficient investment and insurance strategies, asset protection and philanthropy.

April 10 – 12, 2019 in Montreal, Quebec



26th Annual CAGP National Conference
on Strategic Philanthropy

Monday, April 15, 2019

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

The Social and Economic Impact of the Charitable Sector

Crystal Tremblay, University of Victoria

The 2030 UN Sustainable Development Goals represent a revolutionary global consensus that nations have in achieving development. Crystal will share her research findings which examine the social impact and economic activity of civil society in the CRD. This study is the first of its kind that provides a comprehensive illustration of the economic activity and social impact of the charitable sector in this community.

May LEAVE A LEGACY™ Event

May 2019 *Details to follow*



Monday, June 3, 2019

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

Cocktail Reception

Trends in Philanthropy / Annual General Meeting

Paul Nazareth, Canadian Association of Gift Planners

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

HOW TO JOIN CAGP

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

ON THE WEB:

www.cagp-acdp.org

BY PHONE:

1.888.430.9494

FOR MORE INFORMATION ON CHAPTER MEMBERSHIP

Hilary Abbott, Membership Chair

cagpvimemberchair@gmail.com

250.715.8565 (cell/text)



For other upcoming events, webinars, and educational opportunities sponsored by CAGP National:

www.cagp-acdp.org

CAGP WEBINARS WEDNESDAY (register on-line)

- September 12, 2018 Explore the impact of the GRE regime on charitable giving *FREE WEBINAR*
- September 26, 2018 Diving into gift agreements
- October 31, 2018 Delivering the unexpected
- November 14, 2018 How to get legacy donors and prospects in the 21st century *FREE WEBINAR*
- November 28, 2018 Details Matter: Ensuring your charity gets the full benefit of its legacy gift
- January 30, 2019 Tailoring the philanthropic discussion
- February 27, 2019 Unusual gifts exempt from capital gains
- March 27, 2019 A proactive and brand-oriented marketing approach to legacy giving
- April 24, 2019 Insurance gifts without the headaches
- May 29, 2019 A gift acceptance P&P tune up
- June 26, 2019 Building a culture of philanthropy – the secret to success