

CANADIAN ASSOCIATION OF GIFT PLANNERS VANCOUVER ISLAND CHAPTER

LUNCH & LEARN AND MORE!

2017 – 2018

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

Monday, September 18, 2017

4:30 pm – 6:00 pm

CAGP's Annual Mix & Mingle

Bard & Banker

1022 Government Street



Please join us to mingle and mix and celebrate the new program season – bring a guest and introduce them to our Chapter.

RSVP Required – No Charge

Appetizers and one beverage provided compliments of CAGP Vancouver Island

Wednesday, October 11, 2017

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

PIPA for the Non-Profit/Charitable Sector

Drew McArthur, A/Commissioner

Office of the Information and Privacy Commissioner for BC

The Personal Information Protection Act (PIPA)

regulates the information and privacy practices for not-for-profits and charities that collect, use or

disclose personal information. A/Commissioner

McArthur will provide you with the tips and tools to

promote compliance and have a better

understanding of how BC's access and privacy laws

work.

Wednesday, November 8, 2017

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

Ethical and Legal Issues with Vulnerable Donors

Stephanie Sieber, LL.B., Sitka Law

Have you heard of MAID? Recently the Supreme Court of Canada looked at the 'right to die' cases that raise fascinating new questions and issues regarding the meaning of informed consent and capacity of vulnerable persons. This presentation will address how the concepts of 'informed consent' and 'capacity' of vulnerable persons, in the planned giving context, are shaped by changing social perspectives and legal rules in Canada. Attendees will learn options to consider for how to try to protect themselves and their organizations while still maintaining and growing donor relationships.

Wednesday, November 22, 2017

National Philanthropy Day

Hosted by the Association of

Fundraising Professionals

For details visit: afpvancouverisland.afpnet.org



Wednesday, December 6, 2017

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

The Happiness Project

Dylan Wiwad, MA, Department of Psychology,

Simon Fraser University

Did you know that research suggests that spending money on other people can lead to more happiness than spending money on oneself? Dylan will explore the nuances and evidence that the giving and happiness relationship is culturally universal, giving giver vs. recipient centric gifts, the role of social connection for giving and happiness, and how the nature of the relationship and the impact of the gift affect happiness.

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 \$30 | Non-Members \$45

Each session held over the lunch hour includes a buffet lunch

Online reservation available at:

www.cagp-acpdp.org/en/events/upcoming

Wednesday, February 7, 2018

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

How to Document a Gift

Michael Blatchford, LL.B., Norton Rose Fulbright Canada LLP

Elizabeth Moxham, LL.B., University of British Columbia

While there is no legal requirement for gifts to be documented in writing, failure to properly document a gift can lead to all kinds of legal and donor relations headaches down the road. There is a variety of different document 'types' that relate to charitable gifts including pledges, deeds of gift, gift agreements and terms of reference. By understanding the differences and using the right form of documentation, organizations can create certainty and avoid complications.

Tuesday, March 13, 2018

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

Joint meeting with the Victoria Estate Planning Council

Tailoring the Philanthropic Discussion

Laura West, LL.B., Norton Rose Fulbright Canada LLP

Laura will share her insight on how to approach the philanthropic discussion with different client groups and which gift strategies might be suited for each group.

April 11 – 13, 2018



25th Annual CAGP National
Conference on Strategic Philanthropy
Winnipeg, Manitoba

Stay tuned for bursary opportunities

Monday, April 23, 2018

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

Prospect Research for Planned Giving

Deborah Walker, Manager - Planned Giving, UVic

Karla Benson, Manager - Prospect Research, UVic

Learn all about prospecting for planned giving – from how to identify the characteristics of a good planned giving prospect to using your database to find legacy givers. This discussion will include 'mellow' marketing techniques that can attract planned giving prospects, as well as using social media as a research tool, advanced internet searching techniques, and useful subscription databases.

May is LEAVE A LEGACY™ Month



May 2018 LEAVE A LEGACY™ Event – May 10, 2018

7:30 am – 9:00 am (registration at 7:15 am)

Light breakfast will be served

Women, Wisdom and Wealth – Panel Discussion

Viola Van de Ruyt, Moderator

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? Are professionals engaging in the kind of conversations that donors want to have?

Please Note New Location

HOTEL GRAND PACIFIC, SOUTH PENDER ROOM

Tuesday, June 26, 2018

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

Gift Planning and Major Gift Fundraising with Individuals

Annual General Meeting

Grant Monck, LL.B., Grant Monck Fundraising Consultant

Grant will draw on over two decades of fundraising experience to discuss the solicitation of major gifts from individuals including gift planning approaches and techniques under one giving umbrella.

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
OR THE PRESENTATION SERIES:

Michelle Johnson, Membership Chair

cagpvimemberchair@gmail.com

778.557.5457



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