CAGP Vancouver Island Mini Conference - Growing Together and Making Change on Vancouver Island

The CAGP Vancouver Island chapter would like to invite you to this exciting mini-conference event as a lead-up to this year's National CAGP conference being held in Vancouver. We will have a number of engaging speakers from our very own chapter along with very special guest, Paul Nazareth, who will be joining us from CAGP national.

SCHEDULE

10:00 -10:30 am
Registration

10:30 – 11:00 am
Gordon Larin, *CEO, First Peoples Cultural Foundation* - Indigenous Led Funds, An Information Sharing Session

Are you an allied professional or part of a settler-based organization wanting to know more about Indigenous-led funds? Join us for an information-sharing session as we hear from Gordon Larin, Executive Director at First Peoples' Cultural Foundation upon his return from the International Funders of Indigenous Peoples' Global Conference in Merida, Mexico – Shifting Power: Indigenous Peoples'Rights, Leadership, and Self-determination.

Indigenous-led funds are very diverse. Each one is unique and there is not one way to accurately describe or define all Indigenous-led funds, but this sharing session will attempt to provide meaningful resources that include reflecting on donor practices and strategies that need to change to better align with Indigenous values and the 4Rs (Respect, Reciprocity, Responsibility, and Relationship) of Indigenous philanthropy.

"Indigenous Led Funds are guided by Indigenous worldviews and led by and for Indigenous Peoples. Indigenous Led Funds strengthen self-determination and support a process that empowers the communities, at the local to the global level, to be able to change paradigms and shift power relations addressing the asymmetry of powers and resources to recognition and reciprocity."

- IFIP Indigenous-led Funds Working Group, Scott-Enns, I. (2020). Indigenous Ways of Giving + Sharing: Indigenous-led Funds Landscape Scan Report. International Funders for Indigenous Peoples.

11:00 – 11:45 am
Krista Vaartnou*, Farris LLP* - Charities Making Grants to Non-Qualified Donees – Information on CRA Guidance CG-032

The Income Tax Act was amended in 2022 to provide another way for charities to work with non-qualified donees, by making grants to grantee organizations. We will discuss the framework of risk assessment and implementation of accountability tools that charities should all be mindful of before granting to grantee organizations. We will cover the key takeaways from the recent legislative amendment permitting this change to the charitable sector and provide examples of how and why a charity might choose to work with a grantee organization.

11:45 – 12:15 pm

Paul Nazareth*, VP Education and Development CAGP National* – Unlock the Secrets of Personal Philanthropy: Tax Smart Gifts From the Heart

Most people give, because they are asked. At times, fundraising can feel relentless and uncomfortable for both charity and donor. Many Canadians don't know that we have some of the most generous charitable tax incentives in the world and we'll discuss them, with minimal math. We will dig into the Canadian trend of personal philanthropy and how members of this community can support the causes and have an impact on social issues that are most meaningful to them! Get ready for an insightful and fun journey through an exploration of where generosity meets planning.

12:15 – 1:00 pm

Networking Lunch

1:00 – 2:00 pm

Paul Nazareth*, VP Education and Development CAGP National* - The (R)evolution of Philanthropy in Canada

For many high net worth clients, charitable giving is something they are already doing, but, as always, planning is the key to multiplying both philanthropic impact and their personal fulfillment. Join us for business development insight into the current landscape of Canadian philanthropy and where your clients are already engaged in it. We will discuss and share case studies of not just tax benefits but more importantly how to have 'The Philanthropic Conversation' about how expressing generosity through asset based giving, financial and estate planning can help shape that vision including new insights from the estate and financial planning community including new resources on donations of life insurance and more advanced charitable estate planning discussions can all be fostered with local experts.

Invitation notes, you will leave with:

- A conversation roadmap to more deeply engage with current clients and add value to them as a philanthropic advisor
- How to grow your book of business and engage new clients through the philanthropic conversation and what products fall into this strategy (ie. Life Insurance, securities) and how you can partner with the CAGP community
- A better understanding of many new trends in philanthropy (Advised funds, crowdfunding, social-impact movements etc.)
- More information about the advisor designation MFA-P; Master Financial Advisor in Philanthropy as well as professional development programs in your area of work (tax, insurance, estate planning)

2:00 – 2:15 pm

Afternoon Break

2:15 – 3:00 pm

Will Power Panel

Hear from a panel of your local Vancouver Island colleagues who are harnessing the "power" of the Will Power Campaign