



CAGP GREATER VANCOUVER AREA CHAPTER

A better world through strategic charitable giving...

PRESENTATION SERIES 2021-2022

The CAGP Greater Vancouver Area Chapter meetings provide high-quality presentations and networking opportunities for representatives from the charitable sector as well as estate and financial planning professionals. Meetings are open to members and non-members. A discount is available to members.

SEPTEMBER 2021

Taking Your Planned Giving Website From Good to Great!

Thursday, Sept 16, 2021

10:00 - 11:00 am (PST)
Zoom Presentation

Speakers:

Charlotte Field, Partner & Head of Client Delivery, Good Works
Cherish Lo, Senior Executive Director, Marketing Planned Giving,
City of Hope

Planned giving websites have never been more important. For an increasing number of donors, they are the first stop on a journey to leaving a meaningful bequest gift. Join Charlotte Field of Goodworks who will share cutting-edge research on planned giving websites, and Cherish Lo who will share a real-life case study from City of Hope.

OCTOBER 2021

Estate Planning for Chinese-Canadians: Part II

Thursday, Oct 21, 2021

10:00 - 11:00 am (PST)
Zoom Presentation

Speakers:

Joyce Lee, Q.C., TEP, Partner, Deloitte Legal Canada LLP
Jie Cheng, Associate Professor, Peter A. Allard School of Law, UBC
Jessica Lo, BSc, JD, TEP, Manager, Estate Planning, Solus Trust
Company

How can professional advisors and charities best serve the goals and meet the expectations of Chinese-Canadians considering charitable giving as part of their estate planning process? Our speakers will share a case study on estate planning and a review of philanthropy in China.

NOVEMBER 2021

The Impact of Low Interest Rates on Charities and Endowments

Tuesday, Nov 30, 2021

5:00 - 6:30 pm (PST)
Virtual Event

Speaker: JoAnne Mulligan, Connor Clark & Lunn Private Wealth

Joint Event with Vancouver Estate Planning Council

JANUARY 2022

Decolonizing Philanthropy and Gift Planning

Thursday, Jan 20, 2022

Speaker: TBD

FEBRUARY 2022

A Narrative Approach to the Philanthropic Conversation: Choosing and Telling Stories Strategically

Thursday, Feb 17, 2022

In person breakfast session
& half-day workshop
Venue: TBD

Speaker: Norma Cameron

MARCH 2022

Financial Advisors & Philanthropy

Thursday, March 17, 2022

10:00 - 11:00 am (PST)
Zoom Presentation

Speaker: Mike Todd, Vice President, Sales, Amicus.io

Why should financial advisors concern themselves with philanthropy? How can gift planners work best with financial advisors?

APRIL 2022

CAGP National Conference in Halifax, N.S.

April 6-8, 2022

MAY 2022

Family Philanthropy: Keeping the Kids in the Picture

Thursday, May 19, 2022

Speakers:

Roger Lee, Partner, DLA Piper (Canada) LLP
Emma Ferguson, Alexander Holburn Beaudin + Lang LLP

Joint meeting with CBABC – Charities & NPO Section

Learn about how and why donors may wish to involve their children in their charitable giving (both during the donors' lifetimes and in discussions about future planned gifts) and the risk to planned gifts if children are excluded from discussions about - and planning for - charitable gifts.

EVENT DETAILS

Start Times

Unless otherwise noted, meeting times are 10:00 am to 11:00 am.

Location

Unless otherwise noted, all presentations will be held online on Zoom

Session Pricing

For virtual presentations:

CAGP members \$10

Non-members \$20

For in person sessions: TBD

Bursaries Available:

CAGP Greater Vancouver Chapter acknowledges that our sector has faced a difficult and unprecedented year and many organizations and gift planners are facing financial barriers to professional development. We are proud to offer bursaries to members and non-members to attend virtual chapter events free of cost. Please refer to the registration page for the event you wish to attend for a link to apply for a bursary.

HOW TO JOIN CAGP

On the web: www.cagp-acpdp.org

By phone: 1-888-430-9494

Greater Vancouver Area Chapter Website:

www.cagp-acpdp.org/en/chapter/greater-vancouver

Annual CAGP Associate membership fee	\$375
Annual CAGP Associate Non-profit membership fee	\$325
Annual student fee	\$85
Annual Charity/Non-profit Organization membership fee	
4 members	\$1,000
5-10 members add each	\$250
10+ members add each	\$200
Annual Small Non-profit Charity membership	\$150
Annual Retiree membership	\$85

For full membership details and application go to:

www.cagp-acpdp.org/en/membership-categories-fees

For more information on the CAGP Greater Vancouver Area Chapter, Presentation Series, contact:

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