



## Gift Planning Fundamentals

### Agenda

#### Morning (8:00 a.m. – 12:15 p.m.)

- Introduction
  - Why GPF and what you'll learn
  - Charitable landscape in Canada
  - Strategic Gift Planning and donor-centred approach
  - Social Capital and Values-based planning
  - *Personal learning objectives*
- Key concepts
  - Primer on taxation and charity principles - glossary of terms
  - Tax treatment of a cash gift and net cost of gift
  - The donor conversation and learning a donor's story
  - Getting the visit
  - Discovery questions
  - Gift Acceptance Policy
- *Practicing the conversation with donors regarding their interests*

#### BREAK 10:00 – 10:30 a.m.

- Publicly listed securities
  - How PLS gifts work
  - Prospective donors for PLS
  - Marketing PLS
  - Administrative tips for PLS
- Charitable Bequests
  - How bequests work
  - Probate
  - Tax treatment of bequest gift
  - Talking about bequests
  - Bequest Administration
  - Marketing Bequests
  - Tracking and reporting on Bequests
- *Practicing the conversation with donors regarding gifts in a will*

## **Afternoon (1:15 p.m. – 5:00 p.m.)**

- Gifts of Registered Funds
  - How they work
  - Prospective donors for gifts of Registered Funds
  - Tax treatment of gift of Registered Fund
  - Marketing and Administering Tips
- Gifts of Life Insurance
  - How they work
  - Advantages and disadvantages of LI gifts
  - Two common ways they work
    - Tax credits during lifetime
    - Tax credits for proceeds on death
  - Examples of tax treatment
  - Wealth replacement insurance
  - Marketing insurance gifts
  - Administrative considerations
- Charitable Gift Annuities
  - How they work
  - Reinsured Gift annuity examples
  - Example of annuity + insurance
  - Marketing Gift annuities
  - Administrative considerations
- Gifts in kind
  - How they work
  - Example of gift of principal residence
  - Target audience
- *Case study in groups – present to larger group after the break*

BREAK 3:00 – 3:30 p.m.

- Where to Donate
  - How a DAF works
  - Other funds
- Involving Others
  - Others in your shop
  - Working with Professional Advisors
  - Involving the donor's family
- *Personal Action Plan*