



Gift Planning Fundamentals Online

AGENDA

Eastern Canada (Ontario, Québec & Maritimes)

Tuesday, May 18 (Day 1)
and
Wednesday, May 19 (Day 2)

Tuesday, May 18, 2021

Day 1

Timing according to time zones

9:00 a.m. – 1:30 p.m. ET

10:00 a.m. – 2:30 p.m. AT

We will open the Zoom room 15 minutes early and we will keep the Zoom room open for half an hour after the end of the session for questions & discussion.

Day 1

Eastern Time: 9:00 a.m. – 1:30 p.m.

9:00 – 10:15 a.m. | 15-min. break | 10:30 a.m. – 12:00 p.m. | 30-min. break | 12:30 – 1:30 p.m.

Atlantic Time: 10:00 a.m. – 2:30 p.m.

10:00 – 11:15 a.m. | 15-min. break | 11:30 a.m. – 1:00 p.m. | 30-min. break | 1:30 – 2:30 p.m.

(Optional: stay for half an hour at the end for questions/discussion.)

- Introductions
 - Course overview and learning expectations
 - Charitable landscape in Canada with updates on what we know of COVID-impact
 - Strategic Gift Planning and donor-centred approach
 - Social Capital and Values-based planning
 - *Personal learning objectives – Goals*

- 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 for blended (major/planned) visits
 - Involving the donor's family
 - Gift Acceptance Policies

- Publicly listed securities
 - How PLS gifts work
 - Prospective donors for PLS
 - Marketing PLS
 - Administrative tips for PLS

- Charitable Bequests
 - How bequests work
 - Probate fees and discussions across Canada
 - Tax treatment of bequest gift
 - Talking about bequests
 - Bequest Administration
 - Marketing Bequests
 - New Will Power campaign and White Paper insight
 - Tracking and reporting, stewardship and recognition on Bequests



Wednesday, May 19, 2021

Day 2

Timing according to time zones

9:00 a.m. – 1:30 p.m. ET

10:00 a.m. – 2:30 p.m. AT

We will open the Zoom room 15 minutes early and we will keep the Zoom room open for half an hour after the end of the session for questions & discussion.

Day 2

Eastern Time: 9:00 a.m. – 1:30 p.m.

9:00 – 10:15 a.m. | 15-min. break | 10:30 a.m. – 12:00 p.m. | 30-min. break | 12:30 – 1:30 p.m.

Atlantic Time: 10:00 a.m. – 2:30 p.m.

10:00 – 11:15 a.m. | 15-min. break | 11:30 a.m. – 1:00 p.m. | 30-min. break | 1:30 – 2:30 p.m.

(Optional: stay for half an hour at the end for questions/discussion.)

- Review of concepts from day before
- 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
- Marketing insurance gifts
- Administrative considerations

- Gifts in kind
 - How they work
 - Example of gift of principal residence
 - Target audience

- *Case study done in groups (breakout Zoom rooms) – present to larger group after the break*

Different options donors have to support your charity (current and future trends)

- How a Donor Advised Fund works
- A new DAF landscape of philanthropy
- Other funds
- Involving Others
 - Working with Professional Advisors
- *Personal Action Plan Review*

Adjournment