Advanced Canadian Gift Planning Summit

Ryerson University, Toronto, Ontario
May 28-29, 2020

AGENDA

Thursday, May 28	
8:00 a.m.	Breakfast
8:30 a.m.	Welcome and Introduction of Today's Sessions and Speakers
9:00 – 10:15 a.m.	**Session #1 – Modernizing The Legal Framework for Charities: The Role of the Advisory Committee** *Presented by: Bruce MacDonald, Imagine Canada and Hilary Pearson, Co-Chair, Advisory Committee on the Charitable Sector* The Advisory Committee on the Charitable Sector was created in 2019 as a consultative forum for the federal government and the charitable sector to engage in meaningful dialogue, to advance emerging issues relating to charities, and to ensure the regulatory environment supports the work of charities as effectively as possible. Join Hilary Pearson and Bruce Macdonald, sector Co-Chairs of the Advisory Committee to find out more about the Committee's emerging workplan and priorities and to provide your input on key regulatory issues for charities and donors.
10:15 – 10:45	Break
10:45 – 11:45 a.m.	**Session #2 – The Philanthropy of Private Business Shares** *Presented by: Brenda Lee-Kennedy, PricewaterhouseCoopers LLP* Learn about helping private business shareholders identify and unlock the value of their companies for philanthropy, including a case study on a gift of private company preferred shares.

11:45 – 12:15	**Session #3 –** Case Study
12:15 – 12:30 p.m.	**Group Photo**
12:30 – 1:30 p.m.	Lunch
1:30 – 2:30 p.m.	**Session #4 – One Size Doesn't Fit All: Targeting your Charitable Strategy to the Donor** *Presented by: Jamie Golombek, CIBC Financial Planning & Advice* Philanthropy forms part of nearly every client meeting Jamie conducts with high net worth clients. Join us as Jamie shares his personal experiences and discussions with clients on the topic of strategic charitable giving and how he tailors the philanthropic solution to meet the client's situation.
2:30 – 3:00 p.m.	**Session #5** – Case study
3:00 – 3:30 p.m.	Break
3:30 – 4:30 p.m.	**Session #6 – Panel: Tales from the Trenches** *Experienced CAGP members discuss their experiences with actual gift situations where creative solutions were required to close the gift and realize the donor's philanthropic wishes!* *Panelists to be confirmed.*
4:30 – 5:00 p.m.	The Day's Discussion and overview
5:00 – 5:30 p.m.	Break
5:30 – 6:00 p.m.	Reception
6:00 – 7:30 p.m.	Dinner

Friday, May 29	
8:00 a.m.	Breakfast
8:30 a.m.	Welcome and Introduction of Today's Sessions and Speakers
9:00 – 10:00 a.m.	**Session #7** – **Cross-Border Charitable Gifts (Canada/US)** *Presented by: Armando Minicucci, Partner, Grant Thornton LLP and Erin Podio, Senior Manager, Grant Thornton LLP* The likelihood of a charity encountering a donation that involves the USA/Canada border is on the rise. Loyal donors are asking Canadian charities if they can make such donations, and charities are often left with no ability to help point the donor in the right direction. In this session, the major cross border situations such as donors living in USA gifting to Canadian charities,

	Canadians gifting USA situs property, and so forth will be illustrated and helpful; tips provided to point donors in the right direction.
10:00 – 10:30 a.m.	Break
10:30 – 11:30 a.m.	**Session # 8 – Cross Border Philanthropy from a Canadian Charitable Perspective** *Presented by: Mark Blumberg LL.B., LL.M., TEP, Blumberg Segal LLP* Cross border philanthropy is growing at a significant rate. Canadian charities spend over $4 billion outside of Canada every year and Canadian charities receive over $2.5 billion from foreign sources. This presentation will cover foreign activities (outbound) issues and international fundraising (inbound issues). This presentation will help to unpack some of the issues that Canadian charities, philanthropists and their advisors should be thinking of when considering cross border philanthropy.
11:30 – 12:00 p.m.	**Session #9 – Cross Border Philanthropy: Supporting Charitable Projects Outside of Canada** *Presented by: Jessie Krafft, CAF Canada* Canadians are well-known for their generosity; whether supporting their local communities with their time, talent, or charitable giving, research shows that 72% of Canadians have engaged in charitable activity. What they might not know, however, is that their generosity can extend globally in a safe, secure, and efficient manner. Join Jessie Krafft, Vice President of Donor and Program Services at CAF Canada, to learn about how Canadians can support charitable projects around the world. This session will address CRA regulations on funding international projects, how to build a project agreement, and more.
12:00 – 1:00 p.m.	Lunch
1:00 – 2:00 p.m.	**Session #10 – Private Corporations: Insured Gifting Opportunities** *Presented by: Brenda McEachern, RBC* Gifting existing life insurance policies is in the news! This session will explore why corporations consider gifting an existing life policy and the resulting tax implications. We will also review the role that corporate life insurance can play in funding philanthropy on the death of a shareholder, particularly with regard to gifting of freeze preferred shares. Changing tax rates are shifting post-mortem planning strategies and driving many new opportunities for corporate insured philanthropy.
2:00 – 3:00 p.m.	**Session #11 – Charitable giving using Trusts – Tackling the complexities** *Presented by: Amanda Stacey, Norton Rose Fulbright* Trusts are a frequently used estate planning tool. This session will explore the issues and traps associated with making charitable gifts out of a trust, whether it is a family trust, alter ego/joint partner trust, or a trust established in a Will.
3:00 – 3:30 p.m.	Break

3:30 – 4:30 p.m.	**Session #12 – The Court's View of Mental Competency – it may not be what you thought!** *Presented by: John Poyser, Tradition Law LLP Estates and Trusts* One of if not the biggest fears of working with seniors is mental competency. Will the gift be challenged on the grounds that the donor was not mentally competent? John will explore how the courts view this delicate issue and will show you that there is no one way or the highway for all situations. In reality, it all comes down to marbles.
4:30 – 5:00 p.m.	Questions & Review
5:00 p.m.	Adjournment