



Advanced Canadian Gift Planning Symposium

October 17-18, 2018

AGENDA

Tuesday, October 16

An optional informal evening gathering will be planned for those who wish to attend

Wednesday, October 17	
8:00 a.m.	Breakfast
8:30 a.m.	Welcome and Introduction of Today's Sessions and Speakers
9:00 a.m.	Charity performed Abroad - Practical Tips and Minefields Presented by: Robert Kleinman, Executive Director, Jewish Community Foundation of Montreal; Mark Blumberg, Partner, Blumberg Segal LLP Conducting charitable work abroad is possible although special attention is required. This session draws on learnings from actual experiences of undertaking such work.
10:00 a.m.	Break
10:30 a.m.	Special Senate Committee on the Charitable Sector Presented by: The Honourable Ratna Omidvar, C.M., O.Ont., Senator for Ontario, The Senate of Canada A Special Senate Committee was recently established to consider ways to bolster Canada's charitable sector. This session will be an interactive conversation with the Committee's Deputy Chair about some of the issues currently before the Committee, and an opportunity to share your perspective with Senator Omidvar on important matters for the Committee to consider.

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11:30 a.m.	<p>The Graduated Rate Estate and Testamentary charitable gifting... the brave new world Presented by: M. Elena Hoffstein, Partner, Fasken This talk will focus on the (relatively) new rules around testamentary charitable giving and explore both the benefits of the new regime as well as identify some traps to avoid in maximizing a charitable gift.</p>
12:30 p.m.	Lunch
1:30 p.m.	<p>Problems with extended benefits and promises made to donors Presented by: Brenda McEachern, Vice President, Insurance, Estate Planning Services, RBC Wealth Financial Services Inc. Whole life policies were thought to be permanent. Pay the premiums and the death benefit was guaranteed. Brenda will show us that may not be the case with extended benefits, premium holidays, and so forth. Factors that will cause significant issues with donors and their expectations.</p> <p><i>Session sponsored by Cardinal Capital Management, Inc.</i></p>
2:30 p.m.	Break
3:00 p.m.	<p>CRA Update CRA Charities staff will provide an update on what's new at CRA which will be followed by a brief Q&A on policy related questions.</p>
3:30 p.m.	<p>What's wrong with endowments today? Presented by: Doug Puffer, Director of Personal and Planned Giving, Carleton University Perhaps its market performance, low payouts, conservative investing, setting the benchmarks too high or too low. Maybe its residual fear of 2008. But perhaps it is because institutions don't set them up the right way from the start. A new initiative at Carleton University caused Doug to go back to the drawing board and devise a more practical approach to endowment funding, especially for faculty positions in a university setting.</p> <p>Doug will share the model and explain how it was developed and why interdepartmental cooperation is key in developing your own gift plan for endowments. You will also hear about the proposed National Centre for Research in Philanthropy, Nonprofits and Social Enterprise at Carleton University and how the endowment assures its long term success.</p>
4:30 p.m.	Discussion and overview
5:30 p.m. – 7:30 p.m.	Working Dinner - Case Studies

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Thursday, October 18	
8:00 a.m.	Breakfast
8:30 a.m.	Welcome and Introduction of Today's Sessions and Speakers
9:00 a.m.	<p>Thoroughly Modern, or a Bicycle for a Fish? How Public Policy fits Philanthropy Presented by: Susan Phillips, Professor, Graduate Supervisor, Philanthropy and Nonprofit Leadership; Carleton University</p> <p>Is public policy and regulation of fundraising and philanthropy keeping up with the needs of the sector? Professor Susan Phillips will argue that self-regulation has become much more important due to various scandals and changing policy.</p>
10:00 a.m.	Break
10:30 a.m.	<p>Donor Advised Funds Project Presented by: Keith Sjogren, Managing Director, Consulting Services, Strategic Insight; Katherine Dalziel, Masters Student, Philanthropy and Nonprofit Leadership, Carleton University; Karen Hudson, Consultant, Strategic Insight</p> <p>In this session, Katherine Dalziel, Keith Sjogren, and Karen Hudson will present key findings from a recently released report on donor advised funds. This comprehensive report, published by Strategic Insight, examines the state of the Canadian market, based on input from donors, sponsors, regulators and financial advisors. The report also references developments in the U.S. market.</p> <p>The presentation and discussion will illustrate how the offerings of community foundations and financial institutions complement each other to bridge a space between wealth management and philanthropy. The session will also include information on the market size and the outlook for further development.</p> <p>From this session attendees will learn about donor advised funds, how they work, and where they fit in the philanthropic landscape. The session will also highlight issues that have emerged as the interest and activity in donor advised funds moves them from the wings to centre stage.</p>
12:00 p.m.	Lunch
1:00 p.m.	<p>Out-of-the-Box Gifts Presented by: Jo-Anne Ryan, Vice President, Philanthropic Advisory Services at TD Wealth; Troy McEachren, Partner Miller Thomson LLP</p> <p>Please join Troy McEachren, Partner Miller Thomson and Jo-Anne Ryan, VP Philanthropy and Executive Director, Private Giving Foundation who will share actual stories that involved receiving out of the box gifts. These include gifts of private company shares, private REITS, and gifts involving potential private benefit and recognition.</p>

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2:15 p.m.	Break
2:45 p.m.	The Perfected Gift: it may not be what you think! Presented by: John Poyser, Partner, Tradition Law LLP Estates and Trusts John will discuss various cases where the courts have ruled that a gift was perfected, what was required, what the charity needs to do. <i>Session sponsored by Cardinal Capital Management, Inc.</i>
4:00 p.m.	Questions & Review
5:00 p.m.	Adjournment

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