Gift Planning Fundamentals for Professional Advisors – Empowering Client Philanthropy

AGENDA

7:30 – 8:00 a.m. – Registration/buffet breakfast
8:00 a.m. – 4:30 p.m. – Course

8:00 a.m. - Introduction
• Gift Planning Fundamentals: Overview of the Day
• Charitable and advisor landscape in Canada
• Personal learning objectives
• Having the Philanthropic Conversation With Clients
• What’s In It For Clients?
• What’s In It For You?

How: Preparing You
• Primer on taxation and charity principles
• Tax treatment of a cash gift and net cost of gift
• Trigger Events and Client Prospecting
• Practicing having client conversations

9:30 – 10:00 a.m. – BREAK

10:00 a.m. – 12:15 p.m.

What: The Gift Planning Vehicles – Part 1
• Publicly listed securities
• Flow-Through Shares
• Private Company Shares
• Charitable Bequests
• Practicing the conversation with clients regarding gifts in a will

12:15 p.m. - LUNCH
1:15 – 2:00 p.m.

What: The Gift Planning Vehicles – Part 2
- Gifts of Registered Funds
- Gifts of Life Insurance
- Charitable Gift Annuities
- Gifts in Kind

Where: Charities, Foundations and Donor Advised Funds

2:00 – 3:00 p.m. Case Study Work

3:00 – 3:30 p.m. – BREAK

3:30 – 4:30 p.m.

How: Empowering Philanthropy
- Getting started
- Roadblocks and obstacles
- Working with Charities
- Incorporating Philanthropy in your Practice
- The MFA-P Designation

Conclusion
- Final Thoughts
- Personal Action Plan
- CAGP and Your Business