



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