Gift Planning Fundamentals Online

AGENDA

Wednesday, October 12 (Day 1)
and
Thursday, October 13 (Day 2)

Wednesday, October 12, 2022

Day 1
Timing according to time zones

Pacific 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.

Mountain 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.

Central Time: 11:00 a.m. – 3:30 p.m.
11:00 a.m. – 12:15 p.m. | 15-min. break | 12:30 – 2:00 p.m. | 30-min. break | 2:30 – 3:30 p.m.

Eastern Time: 12:00 p.m. – 4:30 p.m.
12:00 p.m. – 1:15 p.m. | 15-min. break | 1:30 – 3:00 p.m. | 30-min. break | 3:30 – 4:30 p.m.

Atlantic Time: 1:00 p.m. – 5:30 p.m.
1:00 p.m. – 2:15 p.m. | 15-min. break | 2:30 – 4:00 p.m. | 30-min. break | 4:30 – 5:30 p.m.

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

• Key concepts
  o Primer on taxation and charity principles - glossary of terms
  o Tax treatment of a cash gift and net cost of gift
  o The donor conversation and learning a donor’s story
  o Getting the visit
  o Discovery questions for blended (major/planned) visits
  o Involving the donor’s family
  o Gift Acceptance Policies

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

• Charitable Bequests
  o How bequests work
  o Probate fees and discussions across Canada
  o Tax treatment of bequest gift
  o Talking about bequests
  o Bequest Administration
  o Marketing Bequests
  o New Will Power campaign and White Paper insight
  o Tracking and reporting, stewardship and recognition on Bequests
Thursday, October 13, 2022

Day 2

Timing according to time zones

- **Pacific Time:** 9:00 a.m. – 1:30 p.m. PT
- **Mountain Time:** 10:00 a.m. – 2:30 p.m. MT
- **Central Time:** 11:00 a.m. – 3:30 p.m. CT
- **Eastern Time:** 12:00 p.m. – 4:30 p.m. ET
- **Atlantic Time:** 1:00 p.m. – 5:30 p.m. AT

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Day 2

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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.

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**Eastern Time:** 12:00 p.m. – 4:30 p.m.
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**Atlantic Time:** 1:00 p.m. – 5:30 p.m.
1:00 p.m. – 2:15 p.m. | **15-min. break** | 2:30 – 4:00 p.m. | **30-min. break** | 4:30 – 5:30 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