Gift Planning Fundamentals Online

AGENDA

Wednesday, October 12 (Day1)
and
Thursday, October 13 (Day 2)

Wednesday, October 12, 2022

Day 1

Timing according to time zones

9:00 a.m. – 1:30 p.m. PT
10:00 a.m. – 2:30 p.m. MT
11:00 a.m. – 3:30 p.m. CT
12:00 p.m. – 4:30 p.m. ET
1:00 p.m. – 5:30 p.m. AT

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.

Day 1

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.

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

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

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

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

Thursday, October 13, 2022

Day 2

Timing according to time zones

9:00 a.m. – 1:30 p.m. PT
10:00 a.m. – 2:30 p.m. MT
11:00 a.m. – 3:30 p.m. CT
12:00 p.m. – 4:30 p.m. ET
1:00 p.m. – 5:30 p.m. AT

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we will keep the Zoom room open for half an hour after the end of the session
for questions & discussion.

Day 2

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.
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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