



Gift Planning Fundamentals Online

AGENDA

Tuesday, October 17 (Day 1)
and
Wednesday, October 18 (Day 2)

Tuesday, October 17, 2023

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 10 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



Wednesday, October 18, 2023

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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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.

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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