Gift Planning Fundamentals Online 2025

AGENDA

Monday, October 20 (Day1)
and
Tuesday, October 21 (Day 2)

Monday, October 20, 2025

Day 1

Timing according to time zones

9:00 a.m. – 1:30 p.m. PDT
10:00 a.m. – 2:30 p.m. MDT
10:00 a.m. – 2:30 p.m. CST
11:00 a.m. – 3:30 p.m. CDT
12:00 p.m. – 4:30 p.m. EDT
1:00 p.m. – 5:30 p.m. ADT

We will open the Zoom room 5 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 Daylight 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 & Central Standard 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 Daylight 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 Daylight 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 Daylight 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.

- Introduction
  - Why Gift Planning Fundamentals and what you'll learn
  - Strategic Gift Planning
  - Charitable landscape in Canada
  - Social Capital and Values-based planning
  - Personal learning objectives

- Key concepts
  - Primer on taxation and charity principles - glossary of terms
  - Tax treatment of a cash gift and net cost of gift

- Donor Conversations
  - Tips on getting the visit
  - Discovery questions
  - Learning the donor's story
  - Involving the donor's family
- Practicing the conversation with donors regarding their interests (Group work)

BREAK (20 min)

- Types of Gifts
  - Gift Acceptance Policy

- Publicly listed securities
  - Tax treatment of appreciated property
  - How PLS gifts work
  - Issuing the Tax Receipt and other Administrative tips
  - Prospective donors
  - Marketing

- Charitable Bequests
  - Key points about bequests and bequest programs
  - Estate Tax basics and Estate Planning (includes probate)
  - Tax treatment of bequest gift, includes example
  - Bequest Administration
  - Talking to donors about bequests
  - Marketing Bequests (Will Power is in this section)
  - Recognizing, Tracking and Reporting on Bequests

- Practicing the conversation with donors regarding gifts in a will. (Group work & debrief)

Tuesday, October 21, 2025

Day 2

Timing according to time zones

9:00 a.m. – 1:30 p.m. PDT
10:00 a.m. – 2:30 p.m. MDT
10:00 a.m. – 2:30 p.m. CST
11:00 a.m. – 3:30 p.m. CDT
12:00 p.m. – 4:30 p.m. EDT
1:00 p.m. – 5:30 p.m. ADT

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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

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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

- Case study (groups)

BREAK (20 min.)

- Present Case Study by group

- Where to Donate
  - Direct to Operating Charity
  - Through Donor Advised Fund
  - Through Private Foundation

- Involving Others
  - Working with Professional Advisors

- Wrap Up

- Personal Action Plan

Adjournment