CAGP FOUNDATION

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. – 1:15 p.m. PDT
10:00 a.m. – 2:15 p.m. MDT
10:00 a.m. – 2:15 p.m. CST
11:00 a.m. – 3:15 p.m. CDT
12:00 p.m. – 4:15 p.m. EDT
1:00 p.m. – 5:15 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. – 1:15 p.m.
9:00 – 10:15 a.m. | 15-min. break | 10:30 a.m. – 12:15 p.m. | 15-min. break | 12:30 – 1:15 p.m.

Mountain Time & Central Standard Time: 10:00 a.m. – 2:15 p.m.
10:00 – 11:15 a.m. | 15-min. break | 11:30 a.m. – 1:15p.m. | 15-min. break | 1:30 – 2:15 p.m.

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

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

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

- 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)

- Types of Gifts
  - Gift Acceptance Policy

- Public Securities
  - Tax treatment of appreciated property
  - How PS 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
  - Tax treatment of bequest gift
  - Bequest Administration
  - Talking to donors about bequests
  - Marketing Bequests
  - Recognizing, Tracking and Reporting on Bequests

- Practicing the conversation with donors regarding gifts in a will.
  - Case Study debrief

Tuesday, October 21, 2025

Day 2

Timing according to time zones

9:00 a.m. – 1:15 p.m. PDT
10:00 a.m. – 2:15 p.m. MDT
10:00 a.m. – 2:15 p.m. CST
11:00 a.m. – 3:15 p.m. CDT
12:00 p.m. – 4:15 p.m. EDT
1:00 p.m. – 5:15 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 2

Pacific Daylight Time: 9:00 a.m. – 1:15 p.m.
9:00 – 10:15 a.m. | 15-min. break | 10:30 a.m. – 12:15 p.m. | 15-min. break | 12:30 – 1:15 p.m.

Mountain Time & Central Standard Time: 10:00 a.m. – 2:15 p.m.
10:00 – 11:15 a.m. | 15-min. break | 11:30 a.m. – 1:15p.m. | 15-min. break | 1:30 – 2:15 p.m.

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

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

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

(Optional: stay for half an hour at the end for questions/discussion.)

- Review of concepts from Day 1
- 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 deathExamples of tax treatment
- Marketing insurance gifts
- Administrative considerations

- Case study (groups)
  - Present Case Study by group

- Where donors can give
  - Private Foundations
  - Donor Advised Funds

- Involving Others
  - Working with Professional Advisors

- Session Wrap-Up & Reflection
  - Next Steps
  - Personal Action Plan
  - CAGP Resources