Online Gift Planning Fundamentals for Professional Advisors –
Empowering Client Philanthropy

AGENDA

Wednesday, May 18 (Day 1)
and
Thursday, May 19 (Day 2)

Wednesday, May 18, 2022

Day 1

Timing according to time zones

8:00 a.m. – 12:00 p.m. PT
9:00 a.m. – 1:00 p.m. MT
10:00 a.m. – 2:00 p.m. CT
11:00 a.m. – 3:00 p.m. ET
12:00 p.m. – 4:00 p.m. AT

You are welcome to hang around after Day 1 is over;
We will keep the Zoom room open for half an hour for questions & discussion.

Day 1

Pacific Time: 8:00 a.m. – 12:00 p.m.
8:00 – 9:00 a.m. | 10-min. break | 9:10 – 10:10 a.m. | 10-min. break | 10:20 – 11:05 a.m. | 25 min. break | 11:30 – 12:00 p.m.

Mountain Time: 9:00 a.m. – 1:00 p.m.
9:00 – 10:00 a.m. | 10-min. break | 10:10 – 11:10 a.m. | 10-min. break | 11:20 – 12:05 p.m. | 25 min. break | 12:30 – 1:00 p.m.

Central Time: 10:00 a.m. – 2:00 p.m.
10:00 – 11:00 a.m. | 10-min. break | 11:10 – 12:10 p.m. | 10-min. break | 12:20 – 1:05 p.m. | 25 min. break | 1:30 – 2:00 p.m.

Eastern Time: 11:00 a.m. – 3:00 p.m.
11:00 – 12:00 p.m. | 10-min. break | 12:10 – 1:10 p.m. | 10-min. break | 1:20 – 2:05 p.m. | 25 min. break | 2:30 – 3:00 p.m.

Atlantic Time: 12:00 p.m. – 4:00 p.m.
12:00 – 1:00 p.m. | 10-min. break | 1:10 – 2:10 p.m. | 10-min. break | 2:20 – 3:05 p.m. | 25 min. break | 3:30 – 4:00 p.m.

(Optional: stay for half an hour at the end for questions/discussion.)
Introduction
• Gift Planning Fundamentals: Overview of the Day
• Personal learning objectives
• Charitable and advisor landscape in Canada
• Having the Philanthropic Conversation With Clients
• What’s In It For Clients?
• What’s In It For You?

How: Preparing You
• Primer on donation taxation and charity principles
• Tax treatment of a cash gift and net cost of gift
• Trigger events and client prospecting
• Practicing having client conversations (group discussion)

What: The Gift Planning Vehicles – Part 1
• Publicly listed securities
• Flow-Through Shares
• Private Company Shares
• Charitable Bequests
• Practicing bequest conversation with clients (group discussion)
Online Gift Planning Fundamentals for Professional Advisors – Empowering Client Philanthropy

Thursday, May 19, 2022

Day 2

Timing according to time zones

8:00 a.m. – 12:00 p.m. PT
9:00 a.m. – 1:00 p.m. MT
10:00 a.m. – 2:00 p.m. CT
11:00 a.m. – 3:00 p.m. ET
12:00 p.m. – 4:00 p.m. AT

You are welcome to log in 15 minutes early for questions and discussion.

Day 2

Pacific Time: 8:00 a.m. – 12:00 p.m.
8:00 – 9:00 a.m. | 10-min. break | 9:10 – 10:10 a.m. | 10-min. break | 10:20 – 11:05 a.m. | 25 min. break | 11:30 – 12:00 p.m.

Mountain Time: 9:00 a.m. – 1:00 p.m.
9:00 – 10:00 a.m. | 10-min. break | 10:10 – 11:10 a.m. | 10-min. break | 11:20 – 12:05 p.m. | 25 min. break | 12:30 – 1:00 p.m.

Central Time: 10:00 a.m. – 2:00 p.m.
10:00 – 11:00 a.m. | 10-min. break | 11:10 – 12:10 p.m. | 10-min. break | 12:20 – 1:05 p.m. | 25 min. break | 1:30 – 2:00 p.m.

Eastern Time: 11:00 a.m. – 3:00 p.m.
11:00 – 12:00 p.m. | 10-min. break | 12:10 – 1:10 p.m. | 10-min. break | 1:20 – 2:05 p.m. | 25 min. break | 2:30 – 3:00 p.m.

Atlantic Time: 12:00 p.m. – 4:00 p.m.
12:00 – 1:00 p.m. | 10-min. break | 1:10 – 2:10 p.m. | 10-min. break | 2:20 – 3:05 p.m. | 25 min. break | 3:30 – 4:00 p.m.

What: The Gift Planning Vehicles – Part 2

- Gifts of Registered Funds
- Gifts of Life Insurance
- Charitable Gift Annuities
- Gifts in Kind
Where: Where can clients legally give?
• Charities, Foundations and Donor Advised Funds
• Crowdfunding, social-good projects and nonprofits

Case Study Work - Group

How: Empowering Philanthropy
• Getting started
• Roadblocks and obstacles
• Working with charities
• Incorporating philanthropy in your practice
• Getting connected to the charity ecosystem in your region
• The MFA-P designation

Conclusion
• Final thoughts
• Personal Action Plan
• CAGP and your business