



**Online Gift Planning Fundamentals for Professional Advisors –  
Empowering Client Philanthropy**

**AGENDA**

**Tuesday, October 15 (Day 1)  
and  
Wednesday, October 16 (Day 2)**

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**Tuesday, October 15, 2024**

**Day 1**

**Timing according to time zones**

**8:00 a.m. – 12:00 p.m. PDT  
9:00 a.m. – 1:00 p.m. MDT  
9:00 a.m. – 1:00 p.m. CST  
10:00 a.m. – 2:00 p.m. CDT  
11:00 a.m. – 3:00 p.m. EDT  
12:00 p.m. – 4:00 p.m. ADT**

**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 Daylight 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 Daylight Time & Central Standard 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 Daylight 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 Daylight 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 Daylight 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

**Wednesday, October 16, 2024**

### Day 2

Timing according to time zones

**8:00 a.m. – 12:00 p.m. PDT**

**9:00 a.m. – 1:00 p.m. MDT**

**9:00 a.m. – 1:00 p.m. CST**

**10:00 a.m. – 2:00 p.m. CDT**

**11:00 a.m. – 3:00 p.m. EDT**

**12:00 p.m. – 4:00 p.m. ADT**

### Day 2

**Pacific Daylight 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.*

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**Atlantic Daylight 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.*

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### 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