Presentation Series 2018 - 2019

The CAGP Greater Vancouver Area Chapter meetings provide high-quality presentations and networking opportunities for representatives from the charitable sector as well as estate and financial planning professionals. Meetings are open to members and non-members. A discount is available to members.

Wednesday, Sept 19, 2018 7:30 – 9:30 am

The Gift of Life Insurance

DeWayne Osborn, Cardinal Foundation

Flexible, powerful, and potentially extremely lucrative to the owner's beneficiaries, and yet at the end of the day, will there be a payout sufficient to justify foregoing ongoing money in hand (donations) over the years and even decades. This session will discuss some commonly experienced tips and traps when considering a gift of existing life insurance contract to help inform your charity as to whether or not to accept it.

Thursday, Oct 18, 2018 7:30 am - Noon

Half Day – Dementia, Documentation & Dedication

Part I - Dealing with Dementia 8:00 am
Alzheimer's Society of British Columbia

Nearly everyone has a connection to an individual with dementia. Understanding how to best support people living with various forms of dementia assists their ability to maintain a good quality of life. Identifying the signs and learning how to communicate effectively and respectfully when interacting with a person with dementia is increasingly vital at work and in the community.

Part II - Documenting Gifts 9:45 am
Michael Blatchford, LLB, Norton Rose Fulbright Canada LLP
Elizabeth Moxham, LLB, University of British Columbia

While there is no legal requirement for gifts to be documented in writing, failure to properly document a gift can lead to all kinds of legal and donor relations headaches down the road. There are a variety of different document 'types' that relate to charitable gifts including pledges, deeds of gift, gift agreements and terms of reference. By understanding the differences and using the right form of documentation, organizations can create certainty and avoid complications.

Part III – Community and the Economics of Happiness
John Helliwell, PhD 11:00 am

His involvement in the editing of the United Nations World Happiness Report sparked a worldwide discussion on well-being, society, and policy. His personal areas of interest include well-being, social capital, and economics with a philanthropic lens. This is a critical piece of *why* we do what we do.

Thursday, Jan 17, 2019 7:30 – 9:30 am

Talking Finances with Aging Populations

Amy D'Aprix, Gerontologist and Life-Transition Expert

As people plan for their retirement, they often focus on financial planning without placing it in the context of life planning. Yet the who, what, and where, of our later years need to be considered first, as each potentially impacts finances. In addition, the unique considerations that occur with aging are often more profound for childless couples as well as for women. A clear understanding of how to navigate the considerations is key both for the client and the professionals that are assisting them in planning gifts.

Thursday, Feb 21, 2019 7:30 - 9:30 am

Marketing Masterclass for Gift Planners

Eric Weaver, CEO, Transparent Path Inc.

Compelling target audiences to bequeath gifts is one thing. Getting through the noise in the online and offline spaces is quite another. Gift- and estate-planning marketers face enormous hurdles - often without the resources to create significant impact. How can an organization stand out when donor inboxes are overflowing, time is precious, and trust is in short supply? How do we broaden appeal and get teams to work together to spike participation? And which channels — direct, email, mobile, social, programmatic, native advertising, etc. — will provide the best cost per dollar raised, engage audiences and increase gift closing rates?

Start Times
Unless otherwise noted, the meeting times are:

7:30 a.m. Breakfast and Networking
8:00 a.m. Program begins
9:30 a.m. Presentation ends

Location
Unless otherwise noted, the meeting location is:
Terminal City Club, 837 West Hastings Street, Vancouver

Cost
Breakfast Sessions are each $45 for members / $60 for non-members and guests
Half-Day Session is $145 for members / $185 for non-members and guests

These sessions are eligible for CFRE Education credits

CAGP GREATER VANCOUVER CHAPTER

A better world through strategic charitable giving...

Other Professional Development Opportunities

Tuesday, Nov 13, 2018 5:30 - 8:00 pm

Joint Meeting: CAGP Greater Vancouver Area Chapter & Vancouver Estate Planning Council

Location: Law Courts Inn, 800 Smithe Street, Vancouver BC

Tuesday, Mar 12, 2019 5:45 - 8:30 pm

Joint Meeting: CAGP Greater Vancouver Area Chapter & Fraser Valley Estate Planning Council

Location: Guildford Golf and Country Club
7929 – 152 Street, Surrey

April 10-12, 2019

2019 CAGP National Conference
Location: Montreal, QB

For conference details see **www.cagpconference.org**

Thursday, May 16, 2019 7:30 - 9:30 am

Joint CBA/CAGP Session

Location: Terminal City Club, 837 West Hastings Street, Vancouver

How to join CAGP

On the web www.cagp-acpdp.org
By phone 1-888-430-9494

Greater Vancouver Area Chapter Website:
www.cagp-acpdp.org/en/chapter/greater-vancouver

Annual CAGP Associate membership fee $375
Annual CAGP Associate Non-profit membership fee $325
Annual student fee $85
Annual Charity/Non-profit Organization membership fee
4 member = $1,000, 5-10 member add $250 each, 10+ members add $200 each
Annual Small Non-profit Charity membership $150
Annual Retiree membership $85

For full membership details and application go to:
www.cagp-acpdp.org/en/membership-categories-fees

For more information on the CAGP Greater Vancouver Area Chapter Presentation Series, contact:

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