



## CAGP North Saskatchewan Chapter Schedule 2015-16 year

Topic	Speaker	Date/Time	Location
<b>Welcome back Breakfast</b>	CAGP Committee	September 24 9:00 AM	Prairie Ink (McNally Robinson) 3130-8th Street East
<b>Lunch and Webinar</b> 'State of the Legacy Nation' Webinar by Fraser Green *See below for description	Webinar presentation (Fraser Green)	October 22 12:00 PM	Boardroom at Holy Family Cathedral 123 Nelson Road
<b>'Loverizing your Donor'</b> - lunch presentation The 'loverizing' matrix is a method to identify and strategize using specific tactics and meaningful touch points at any given time in a donor/prospect's dance steps	Bev Cooper – Associate Director of Development (Planned Giving) University of Saskatchewan	November 19 12:00 PM	Boardroom at Holy Family Cathedral 123 Nelson Road
<b>Bill C-43 Changes, A Case Study on the Taxation of Estates and Testamentary Trusts</b> – Lunch Presentation	Crystal Taylor- Partner Miller Thomson	January 28, 2016 12:00 PM	Boardroom at Holy Family Cathedral 123 Nelson Road
<b>Presentation by Holly Wagg/Leah Eustace of Goodworks</b> (tentative)	Holly Wagg and Leah Eustace Goodworks	February 12:00 PM	TBA
<b>Lunch and Webinar</b> 'Words that work: what surveys from 12,000 people tell us about the words and phrases that encourage planned giving' By Dr. Russell James ** See below for a description	Webinar presentation (Dr. Russel James)	March 12:00 PM	TBA
<b>Workshop with Stephen Pidgeon-</b> Half day workshop, partnered with AFP (tentative)	Stephen Pidgeon- fundraiser, past owner of a fundraising specialist agency and speaker	April 19 or 21 Half- day workshop	TBA
<b>Leave a Legacy Luncheon</b> For donors, friends and members	TBA	May 11:30 AM	Prairieland Park
<b>Annual General Meeting</b>	CAGP Committee	June 9:00 AM	Prairie Ink (McNally Robinson) 3130-8th Street East



**\*State of the Legacy Nation (October 22<sup>nd</sup>)**

Presented by: Fraser Green

In 2014, Good Works conducted a poll of 1,500 English-speaking adults to find out all about their wills and bequests. This survey replicates an earlier 2010 research study which was the first of its kind in Canada. The results are in - and you can see them all. In this session you'll learn:

- Who's made wills
- How many Canadians have left gifts to charity in their wills
- Who the other beneficiaries are
- How much money is sitting in the wills of living Canadians today
- A demographic breakdown of those who have left charitable bequests
- The linkage between direct mail donors and bequest donors.

Plus, for the first time ever, Fraser will present findings that are specific to the four generational cohorts (Civics, Boomers, Gen Xers and Millennials).

**\*\*Words that work: What surveys from 12,000 people tell us about the words and phrases that encourage planned giving (March 2016)**

Presented by: Dr. Russell James

How do you ask for a bequest gift? How should you describe a complex gift to generate the most interest? This presentation shares results from a series of recent surveys uncovering the words and phrases that work best to encourage interest in planned giving. Dr. James begins with an overview of the neurological processes that drive charitable decision-making and explains how these processes link to the survey results on optimum word choice. Learn practical, scientifically-based approaches that will increase your effectiveness in communicating about planned giving.