

CANADIAN ASSOCIATION OF GIFT PLANNERS VANCOUVER ISLAND CHAPTER

CAGP Vancouver Island Program 2020 – 2021

The CAGP Vancouver Island Chapter is pleased to provide high-quality presentations and networking opportunities for CAGP members, non-members and professional advisors. Sessions are eligible for CFRE credits.

Wednesday, September 30, 2020 - 9:45 am – 11:15 am

Webinar Wednesdays

The Element of \$1 Million Plus Gifts

Malcolm Burrows, Scotia Wealth Management

The number of seven figure plus gifts in Canada is rapidly growing. What are the elements of a one-million-dollar donation? Who gives them? What's the motivation? What are the strategic gift planning issues? And what charities are most likely to receive them? This session will examine donor profiles, gift planning issues, and include interactive case studies to better understand the next stage of philanthropy in Canada.

Wednesday, October 14, 2020

Virtual Mix & Mingle

Please join us to connect with other CAGP members



Wednesday, November 25, 2020 - 9:45 am – 11:15 am

Webinar Wednesdays

Gift Planning Then and Now: What We are Learning in the Time of COVID-19

Jill Nelson, Princess Margaret Cancer Foundation

Peggy Killeen, CAGP Foundation

The words “unprecedented”, “life-changing” and “pivot” became commonplace this year as the entire world responded to the Covid-19 crisis. From donors to funders to charities and fundraisers, the lessons of isolation were unexpected and can't be ignored. From their conversations with leaders and foot soldiers alike, Jill & Peggy review the year that was, and draw some conclusions about what we learned and are still learning, how gift planning may be forever changed, and why this strange new world may bring opportunities.

Wednesday, January 13, 2021 - 9:45 am – 11:15 am

Communications that Support Relationship Building

Vanessa Chase Lockshin, Consultant

Asking is just one part of a successful fundraising program. The other part – the big part – is the relationship building that happens through cultivation and stewardship. If you work with annual level donors, much of this relationship building happens through the content and communications you send to your donors. But the question to asking is – is that content actually doing its job to help build relationships?

Wednesday, February 10, 2021 - 9:45 am – 11:15 am

Working with Clients and Charities to Protect and Expand Your Business

Keith Thompson, Donor Motivation Program

Do you want to learn how to initiate the topic of charitable giving in such a way that your clients will welcome the conversation? In this session, Keith will share philanthropic techniques to build a ‘competitive moat’ around your financial planning business – and generate more referrals! Learn how you can attract and retain high net worth clients through the ‘philanthropic conversation’ and deepen the relationships with your clients. This session will provide you with the tools on how you can be an invaluable resource and consulting party to charities and their donors.

Tuesday, March 9, 2021

12:00 pm – 1:30 pm (registration at 11:45 am)

Joint meeting with the Victoria Estate Planning Council Special Guest Speaker TBD

Wednesday, April 28, 2021 - 9:45 am – 11:15 am

Webinar Wednesdays

Exploring Empathy: A Practical Guide to Embracing Donor Concerns to Inspire Legacy Giving

Lynne Boardman, Harvey McKinnon and Associates

David Kravinchuk, The Common Good Fundraising Agency

Wish you could alleviate your donors’ deepest fears about bequest and help them embrace the exciting possibility of making a transformational gift? We will coach you on confidently addressing donor concerns directly and inspiring them to make a gift in their will. You’ll learn the five most common objections to making legacy gifts and you’ll work in teams to build your very own set of powerful messages to help dissipate donor doubts.

All CAGP sessions will be held virtually during the 2020/21 program year.

Unless otherwise noted, the cost for each learning session is:
Members \$20 | Non-Members \$30

Wednesday, May 26, 2021

9:45 am – 11:15 am

Webinar Wednesdays

Empowered Women are Changing Philanthropy

Jo-Anne Ryan, FEA, MFA-P, TD Wealth

One of the most influential forces in creating change in charitable giving has been the participation in the charitable sector by Canadian women. By 2026 women are expected to control 50% of wealth in Canada. Please join Jo-Anne Ryan, Vice-President, Philanthropic Advisory Services who will discuss women’s unique approach to giving and what your organization should do to successfully cultivate them as donors.

Wednesday, June 16, 2021

9:45 am – 11:15 am

Annual General Meeting – Special Guest Speaker TBD

Additional Webinar Wednesdays available for purchase:

October 28, 2020

Engaging the Next Generation in Strategic Philanthropy

November 4, 2020 ***FREE***

Taking Your Securities Donation Program to the Next Level

January 27, 2021

Taking the Scary out of Legacy

February 24, 2021

Professional Advisors: Door or Window?

March 31, 2021

T² - Taxes and Trusts

May 12, 2021 ***FREE***

Planned Giving for Small Shops: Secrets from Legacy Experts

June 30, 2021

Gifts of Insurance - WTF? (Where’s The Fundraising?)

For other upcoming events, webinars, and educational opportunities sponsored by CAGP National:

www.cagp-acdp.org

CAGP Vancouver Island Chapter Executive

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This year’s program is being generously sponsored by:



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HOW TO JOIN CAGP

CAGP HAS A NEW MEMBERSHIP STRUCTURE TO MEET YOUR NEEDS. FOR MORE INFORMATION:

www.cagp-acdp.org

BY PHONE: 1.888.430.9494

FOR MORE INFORMATION ON CHAPTER MEMBERSHIP

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