



CAGP PRESENTATION SERIES 2019-2020

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.

SEPTEMBER

Iceberg Philanthropy 10 Years Later – Fraser Green

Fraser Green, Good Works
Thursday, Sept 26, 2019

7:30 - 9:30 am

Joint event with AFP

Canadian fundraisers are sitting on a goldmine the likes of which they've never seen – and may never see again. Fraser Green and his Good Works partners have been polling Canadian donors since 2003. This newly released State of the Legacy Nation 2019 research report will enlighten attendees on who's made wills, who's made charitable bequests, and just how big today's (and tomorrow's!) legacy market really is.

NOVEMBER

Responsible Investment 101

Ian Robertson, Odium Brown
Tuesday, Nov 26, 2019

5:30 - 8:00 pm

Joint event with Vancouver Estate Planning Council

Help your clients and donors sort through the alphabet soup of responsible investment:

- What does it mean to be responsible with your investments?
- What is impact investing, and how is it related to philanthropy?
- How are Socially Responsible Investing, ethical investing, Environmental Social and Governance investment analysis and responsible investing different?
- Are there differences in performance?
- What happens when you divest from stocks such as oil or tobacco?

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

SPOTLIGHT: OCTOBER HALF DAY

Thursday, Oct 17, 2019 7:30 am - Noon

Part I - Talking Death Across Cultures & Faith Traditions 8:00 am

Rabbi Adam Stein of Congregation Beth Israel
Harminder Pal Singh, Head Priest at Khalsa Diwan Society Sikh Temple
Tahera Rashid, Senior Lecturer at Az-Zahraa Islamic Centre
Rev. Gary Paterson of St. Andrew's Wesley United Church

This panel presentation will focus on how we approach conversations about death, and planning for death, with donors and clients of various faith and cultural groups. Our panel presenters are representatives from many of the world's great religions and are involved with pastoral care and spiritual leadership in their faith communities. Join us as we explore how we talk about death.

Part II - In Conversation with a Legacy Donor 9:45 am

Lorna Court

For those planning to leave a legacy, the considerations may be numerous. They may be simple or complex. Lorna Court shares insight into the nuances surrounding her choice to make this generous commitment in the hope that knowledge of her journey may assist those professionals aiding other donors successfully navigate this approach to philanthropy.

Part III - WESA Update: The Follies Continue 11:00 am

Margaret Mason

Has the law surrounding WESA developed in any material way? Or - is it just stuck in fact dependent unfortunate decision-making (or lack of decision making) by will makers? Margaret will give us an update regarding current case law, explain any themes or conclusions that can be drawn from those cases, and provide a checklist of "do's and don'ts" for charities embroiled in such disputes.

Join us for breakfast and Session One only, or for your best value and maximum learning stay for the half day.

Thank you to our Presentation Series Sponsor, RGF Integrated Wealth Management



CAGP Greater Vancouver Events continued

JANUARY

Planned Giving for Childless Couples

Amy D'Aprix, Gerontologist and Life-Transition Expert
Thursday, Jan 16, 2020 7:30 - 9:30 am

FEBRUARY

What's Happening with the Graduated Rate Estate?

Laura Peach and Wendy Seet
Thursday, Feb 20, 2020 7:30 - 9:30 am

MARCH

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

Tuesday, Mar 10, 2020 5:45 - 8:30 pm
Location: Guildford Golf and Country Club, 7929 - 152 Street, Surrey

APRIL

2020 CAGP National Conference

April 22-24, 2020
Location: Regina, SK
For conference details see: www.cagpconference.org

MAY

Understanding Donor Advised Funds

Calvin Fong and Liz Moxham
Monday, May 11, 2020 7:30 - 9:30 am

Joint Event with the Charities and Not-for-profit Organization Section of the Canadian Bar Association, BC Branch.

EVENT DETAILS

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
\$120 for members
\$145 for non-members and guests

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 each	\$250
10+ members add each	\$200
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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CAGP GREATER VANCOUVER AREA CHAPTER

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