Gift Planning Fundamentals

Agenda

Morning (8:30 a.m. – 12:15 p.m.)

• Introduction
  o Why GPF and what you’ll learn
  o 2020 charitable landscape in Canada
  o Strategic Gift Planning and donor-centred approach
  o Social Capital and Values-based planning
  o Personal learning objectives

• Key concepts
  o Primer on taxation and charity principles - glossary of terms
  o Tax treatment of a cash gift and net cost of gift
  o The donor conversation and learning a donor’s story
  o Getting the visit
  o Discovery questions
  o Involving the donor’s family
  o Gift Acceptance Policy

• Practicing the conversation with donors regarding their interests

BREAK 10:15 – 10:30 a.m.

• Publicly listed securities
  o How PLS gifts work
  o Prospective donors for PLS
  o Marketing PLS
  o Administrative tips for PLS

• Charitable Bequests
  o How bequests work
  o Tax treatment of bequest gift
  o Talking about bequests
  o Bequest Administration
  o Marketing Bequests
  o Tracking and reporting on Bequests

• Practicing the conversation with donors regarding gifts in a will
Afternoon (1:15 p.m. – 5:00 p.m.)

- Gifts of Registered Funds
  - How they work
  - Prospective donors for gifts of Registered Funds
  - Tax treatment of gift of Registered Fund
  - Marketing and Administering Tips

- Gifts of Life Insurance
  - How they work
  - Advantages and disadvantages of LI gifts
  - Two common ways they work
    - Tax credits during lifetime
    - Tax credits for proceeds on death
  - Examples of tax treatment
  - Wealth replacement insurance
  - Marketing insurance gifts
  - Administrative considerations

- Gifts in kind
  - How they work
  - Example of gift of principal residence
  - Target audience

- Work on Case Study Project in Groups

BREAK 3:15 – 3:30 p.m.

- Present Case Study Solutions by Group
- Where to Donate
  - Donor Advised Funds
  - Other funds

- Involving Others
  - Others in your shop
  - Working with Professional Advisors

- Personal Action Plan