Gift Planning Fundamentals Online

AGENDA
Eastern Canada (Ontario, Québec & Maritimes)

Tuesday, November 2 (Day 1)
and
Wednesday, November 3 (Day 2)

Tuesday, November 2, 2021

Day 1
Timing according to time zones

9:00 a.m. – 1:30 p.m. ET
10:00 a.m. – 2:30 p.m. AT

We will open the Zoom room 10 minutes early and we will keep the Zoom room open for half an hour after the end of the session for questions & discussion.

Day 1

Eastern Time: 9:00 a.m. – 1:30 p.m.
9:00 – 10:15 a.m. | 15-min. break | 10:30 a.m. – 12:00 p.m. | 30-min. break | 12:30 – 1:30 p.m.

Atlantic Time: 10:00 a.m. – 2:30 p.m.
10:00 – 11:15 a.m. | 15-min. break | 11:30 a.m. – 1:00 p.m. | 30-min. break | 1:30 – 2:30 p.m.

(Optional: stay for half an hour at the end for questions/discussion.)
• Introductions
  o Course overview and learning expectations
  o Charitable landscape in Canada with updates on what we know of COVID-impact
  o Strategic Gift Planning and donor-centred approach
  o Social Capital and Values-based planning
  o Personal learning objectives – Goals

• 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 for blended (major/planned) visits
  o Involving the donor’s family
  o Gift Acceptance Policies

• 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 Probate fees and discussions across Canada
  o Tax treatment of bequest gift
  o Talking about bequests
  o Bequest Administration
  o Marketing Bequests
  o New Will Power campaign and White Paper insight
  o Tracking and reporting, stewardship and recognition on Bequests
Wednesday, November 3, 2021

Day 2

Timing according to time zones

Eastern Time: 9:00 a.m. – 1:30 p.m.
Atlantic Time: 10:00 a.m. – 2:30 p.m.

Day 2

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- Review of concepts from day before
- 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
  Marketing insurance gifts
  Administrative considerations

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

Case study done in groups (breakout Zoom rooms) – present to larger group after the break

Different options donors have to support your charity (current and future trends)
  How a Donor Advised Fund works
  A new DAF landscape of philanthropy
  Other funds

Involving Others
  Working with Professional Advisors

Personal Action Plan Review

Adjournment