Gift Planning Fundamentals Online

AGENDA

Eastern Canada (Ontario, Québec & Maritimes)

Tuesday, November 2 (Day1)
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
    - Course overview and learning expectations
    - Charitable landscape in Canada with updates on what we know of COVID-impact
    - Strategic Gift Planning and donor-centred approach
    - Social Capital and Values-based planning
    - *Personal learning objectives – Goals*

- Key concepts
    - Primer on taxation and charity principles - glossary of terms
    - Tax treatment of a cash gift and net cost of gift
    - The donor conversation and learning a donor's story
    - Getting the visit
    - Discovery questions for blended (major/planned) visits
    - Involving the donor's family
    - Gift Acceptance Policies

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

- Charitable Bequests
    - How bequests work
    - Probate fees and discussions across Canada
    - Tax treatment of bequest gift
    - Talking about bequests
    - Bequest Administration
    - Marketing Bequests
    - New Will Power campaign and White Paper insight
    - Tracking and reporting, stewardship and recognition on Bequests

Wednesday, November 3, 2021

Day 2

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 2

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.)

- 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