# Online Gift Planning Fundamentals

## AGENDA

**Tuesday, October 6 (Day1)**
**and**
**Wednesday, October 7 (Day 2)**

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## Tuesday, October 6, 2020

**Day 1**

**Timing according to time zones**

**8:00 a.m. – 12:10 p.m. PT**
**9:00 a.m. – 1:10 p.m. MT**
**10:00 a.m. – 2:10 p.m. CT**
**11:00 a.m. – 3:10 p.m. ET**
**12:00 p.m. – 4:10 p.m. AT**

**You are welcome to hang around after Day 1 is over;**
**We will keep the Zoom room open for half an hour for questions & discussion.**

### Day 1

**Pacific Time: 8:00 a.m. – 12:10 p.m.**
*8:00 – 9:00 a.m. | 10-min. break | 9:10 – 10:10 a.m. | 20-min. break | 10:30 – 11:30 a.m. | 10 min. break | 11:40 – 12:10 p.m.*

**Mountain Time: 9:00 a.m. – 1:10 p.m.**
*9:00 – 10:00 a.m. | 10-min. break | 10:10 – 11:10 a.m. | 20-min. break | 11:30 – 12:30 p.m. | 10 min. break | 12:40 – 1:10 p.m.*

**Central Time: 10:00 a.m. – 2:10 p.m.**
*10:00 – 11:00 a.m. | 10-min. break | 11:10 – 12:10 p.m. | 20-min. break | 12:30 – 1:30 p.m. | 10 min. break | 1:40 – 2:10 p.m.*

**Eastern Time: 11:00 a.m. – 3:10 p.m.**
*11:00 – 12:00 p.m. | 10-min. break | 12:10 – 1:10 p.m. | 20-min. break | 1:30 – 2:30 p.m. | 10 min. break | 2:40 – 3:10 p.m.*

**Atlantic Time: 12:00 p.m. – 4:10 p.m.**
*12:00 – 1:00 p.m. | 10-min. break | 1:10 – 2:10 p.m. | 20-min. break | 2:30 – 3:30 p.m. | 10 min. break | 3:40 – 4:10 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, October 7, 2020**

**Day 2**

**Timing according to time zones**

**8:00 a.m. – 12:10 p.m. PT**
**9:00 a.m. – 1:10 p.m. MT**
**10:00 a.m. – 2:10 p.m. CT**
**11:00 a.m. – 3:10 p.m. ET**
**12:00 p.m. – 4:10 p.m. AT**

**The Zoom room will be available both 15 minutes before starting time as well as a half an hour after the course is over, should you have any questions or wish to chat.**

## Day 2

### Pacific Time: 8:00 a.m. – 12:10 p.m.

*8:00 – 9:00 a.m. | 10-min. break | 9:10 – 10:10 a.m. | 20-min. break | 10:30 – 11:30 a.m. | 10 min. break | 11:40 – 12:10 p.m.*

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(Optional: stay for half an hour at the end for questions/discussion.)

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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