Online Gift Planning Fundamentals

AGENDA

Tuesday, October 6 (Day 1)
and
Wednesday, October 7 (Day 2)

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
  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, 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.

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.)

- Review of concepts from day before
- Gifts of Registered Funds
  - How they work
  - Prospective donors for gifts of Registered Funds
- **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