Original Canadian Gift Planning Course

AGENDA

February 4-8, 2019

The Banff Centre, Banff, Alberta

Monday, February 4	
2:30 – 3:00	**Register in the classroom**
3:00 – 3:45	**Welcome & Orientation** Tips on Getting the Most Out Of the Original Canadian Gift Planning Course
3:45 – 4:30	**Chapter 1: What is Strategic Gift Planning?** Topics/Concepts include: Moving Beyond Cash Gifts, Social Capital
4:30 – 6:00	**Chapter 2: Tax Aspects and Gifts of Cash** Introduction of basic taxation concepts and the tax consequences of donating different classes of property.
6:00 – 7:00	**Dinner**
7:00 – 8:30 p.m.	**Welcome Reception (Courtesy of CAGP)** Preparation exercise

Tuesday, February 5	
7:00 – 8:30	**Breakfast**
8:30 – 8:45	**Chapter 2: Tax Aspects and Gifts of Cash** Quick review
8:45 – 9:45	**Chapter 3: Gifts of Public Securities** Technical overview of donations of cash for charitable purposes and the tax incentives available when donating gifts of public securities.
9:45 – 10:00	**Break**
10:00-11:00	**Chapter 3: Gifts of Public Securities, continued**
11:00-11:45	**Group meets for Assignment #1 (Tax Aspects of Charitable Giving, Cash, Securities)**
11:45 – 12:00	**Group Photo**
12:00 – 1:00	**Lunch**
1:00 – 1:30	**Review of Assignment #1**
1:30 – 3:00	**Chapter 4: Bequests, RRSPs & RRIFs**

	Learn about the tax aspects of bequests, legalities of bequests, how an estate is administered
3:00 – 3:15	**Break**
3:15 – 3:45	**Chapter 4 (continued)**
3:45 – 4:15	**Group meets for Assignment #2 (Bequests, RRIFs & RRSPs)**
4:15 – 4:45	**Review of Assignment #2**
4:45 – 5:45	**Chapter 5: Marketing**
5:45 – 6:30	**Dinner**
6:30	**Johnson Canyon Walk or Free Time**

Wednesday, February 6	
7:00 – 8:30 a.m.	**Breakfast**
8:30 – 8:45	**Review of concepts: Gift of Securities, Bequests & Registered Funds, Marketing**
8:45 – 10:30	**Chapter 6: A Gift Using Life Insurance** Introduction of some of the basic types of life insurance and some of the standard ways of giving with life insurance as well as back-to-back & wealth replacement insurance plans. It also addresses the question whether charities should engage in soliciting life insurance through a focused program.
10:30 – 10:45	**Break**
10:45 – 11:15	**Chapter 6: Life Insurance, continued**
11:15 – 12:30	**Chapter 7: Endowments & Donor Advised Funds** Different types of charitable funds, the basics of endowments, including what charities should have endowments, named endowments, disbursement quota rules, and the fundamentals of investing endowments. Overview, appeal & usefulness of Donor Advised Funds.
12:30 – 1:15	**Lunch**
1:15 – 2:00	**Free Time, optional "Walk & Talk"**
2:00– 3:45	**Chapter 8: Cultivation, Solicitation & Closure** Principles and techniques of cultivation and solicitation, as well as practical program management tools. A balance of theory as well as the practice of engaging donors. The Human side, discussing end of life with donors.
3:45 – 4:00	**Break**
4:00 – 5:15	**Chapter 9: Recognition & Stewardship** Overview of standard methods to recognize and involve donors. One of the key learning objectives is to examine the different recognition and engagement tools – both individual and programmatic. The module also addresses industry standards for crediting planned gifts.
5:15 - 6:00	**Group meets for Assignment #3 (Life insurance and Endowments)**

6:00 – 7:30	**Dinner**
7:30 – 9:00	**Fireside Chat** **Chapter 10: Ethical and Liability Issues** Examine the role that ethics plays in gift planning through ethically challenging gift-planning scenarios and the CAGP Code of Ethics. **Sponsored by:** Cardinal Capital Management, Inc.

Thursday, February 7	
7:00 – 8:30	**Breakfast**
8:30 – 9:00	Review of Assignment #3
9:00 – 9:45	Role Play
9:45 – 10:00	**Break**
10:00 – 11:00	**Groups work on Assignment #4 (Marketing)**
11:00 – 12:00	**Group presentations of Assignment #4**
12:00 – 1:00	**Lunch**
1:00 – 3:00	**Chapter 11: Starting and Administering a Gift Planning Program** Learn about the challenges of starting and/or administering a gift planning program, the process of charitable bequest administration, which charities are ready for gift planning, what the criteria and benchmarks for success are, how to count gifts, and how to evaluate success. Also learn about alternative program design models for smaller charities. Integrating Gift Planning with other Fundraising Programs.
3:00 - 5:30	Groups convene to work on Assignment #5 (Culminating Case Studies)
5:30 – 6:30	**Free time or continue to work on Assignment #5**
6:30	**Leave to walk to town for dinner**
7:00 – 10:00	**Off-site dinner at The Maple Leaf**

Friday, February 8	
7:00 – 9:00	**Breakfast & check out** (Bring your luggage to the classroom or leave it with the front desk)
9:00 – 11:00	**Assignment #5: Culminating Case Study presentations**
11:00 – 12:00	**Parking Lot Topics, Closing Remarks and Presentation**
12:00	**Boxed Lunches will be available**