Original Canadian Gift Planning Course
AGENDA
September 26-30, 2022
The Banff Centre, Banff, Alberta

Monday, September 26	
1:00 – 1:30	**Register in the classroom**
1:30 – 2:15	**Welcome & Orientation** Tips on Getting the Most Out Of the Original Canadian Gift Planning Course
2:15 – 3:00	**Chapter 1: What is Strategic Gift Planning?** Topics/Concepts include: Moving Beyond Cash Gifts to activating Social Capital
3:00 – 3:30	**Break**
3:30 – 6:00	**Chapter 2: Tax Aspects and Gifts of Cash** Introduction of basic taxation concepts and the consequences of donating gifts of assets.
6:00 – 7:00	**Dinner**
7:00 – 8:30 p.m.	**Welcome Reception (Courtesy of CAGP)**

Tuesday, September 27	
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** Overview of the tax incentives available when donating gifts of public securities as well as marketing, administration, receipting and working with brokers.
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**

	Learn about the tax aspects of bequests, marketing legacy gifts, talking to donors, working with advisors and other charities on bequest administration
3:00 – 3:15	**Break**
3:15 – 3:45	**Chapter 4: Gifts from registered funds (RRSPs & RRIFs)**
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: Trends and Tactics** Please don't forget to bring your own gift planning material to share with peers.
5:45 – 6:30	**Dinner**
6:30	**Free Time**

Wednesday, September 28	
7:00 – 8:30 a.m.	**Breakfast**
8:30 – 8:45	**Review of concepts: Gift of Securities, Bequests & Registered Funds, Marketing**
8:45 – 9:45	**Chapter 6: Gifts of Life Insurance** Introduction to the different strategies of gifting life insurance and CAGP's new national guidelines for charities, advisors and donors.
9:45 – 10:30	**Chapter 7: Working with Professional Advisors** Gifts of assets require collaboration with advisors, how should charities of all sizes work with this gift planning partner? We will address common ethical concerns and share CAGP research on "the philanthropic conversation", the business of philanthropy (including the emergence of online wills) and new data from the Will Power campaign. We will also share insights on the CAGP joint designation, the MFA-P, Master Financial Advisor in Philanthropy.
10:30 – 10:45	**Break**
10:45 – 12:30	**Chapter 8: Endowments & Gifts from Public and Private Foundations** Outline of modern endowment strategy; flexible options for creating endowments; endowment policy; and marketing endowment gifts. We will look at the different ways philanthropists use Foundations for their giving and explore the many types of Foundations, including Public, Private, Community, and Donor Advised.
12:30 – 1:15	**Lunch**
1:15 – 2:00	**Free Time, optional "Walk & Talk"**
2:00– 3:45	**Chapter 9: Cultivation, Solicitation & Closure** Principles and techniques of cultivation and solicitation, as well as practical program and moves management tools. A balance of theory as well as the practice of engagement – actually talking to donors.
3:45 – 4:00	**Break**
4:00 – 5:15	**Chapter 10: Recognition & Stewardship** Review and examine the different recognition methods and stewardship strategies – both individual and programmatic. Discuss and share current sector standards for

	crediting major, blended and bequest donations. Deeper discussion on the often missed opportunities of gift growth through stewardship.
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 11: 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.

Thursday, September 29	
7:00 – 8:30	**Breakfast**
8:30 – 9:00	Review of Assignment #3
9:00 – 9:45	Role Play (in binder)
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 12: Managing a Gift Planning Program** Gift planning administration, including: criteria and benchmarks for success, gift acceptance policy, working with finance staff, counting and valuing gifts for reports, and charitable bequest administration. Program design solutions for charities of all sizes, whether starting a program or reactivating a dormant one. A special focus will be on strategies to bring gift planning from the side of your desk to an "integrated strategic giving" calendar, schedule and strategy that you can take back and put to work right away.
3:00 - 5:15	Groups convene to work on Assignment #5 (Culminating Case Studies)
5:15	**Meet in the lobby to head to the restaurant**
5:20	**Leave to walk to the restaurants**
5:45	**Off-site dinner**
After dinner	**Free evening**

Friday, September 30	
7:00 – 8:00	**Breakfast & check out** (Bring your luggage to the classroom or leave it with the front desk)
8:00 – 10:00	**Assignment #5: Culminating Case Study presentations**

10:00 – 11:00	**Parking Lot Topics, Closing Remarks and Presentation**
11:00	**Boxed Lunches will be available**

**Note : The agenda is subject to change*