Original Canadian Gift Planning Course

QUESTIONS & ANSWERS

How long has CAGP offered this course?
As Canada's foremost educator in charitable gift planning, CAGP has been delivering this intensive course (once called "The Banff Course") for 30 years. Originated by gift planning legends Frank Minton, Lorna Somers and Ken Ramsay, the course is the Canadian standard for best practices in seeking, securing and administering gifts to generations of charity executives, professional advisors, charity Board members, and fundraisers.

What will be covered?
In addition to a basic level of technical information on various current and deferred charitable giving options, the course explores the marketing of planned giving, starting, managing and administering a planned giving program, and building donor-centred, long-term relationships. Charitable gifts that will be covered include bequests, registered funds, life insurance and annuities, gifts-in-kind, and public securities.

This course will:

- equip participants with practical skills and knowledge regarding charitable gift options (and gift planning) from a donor-centred perspective;
- prepare participants to manage a gift planning program and to understand the unique responsibilities of a charity actively soliciting, accepting and receipting gifts beyond cash;
- provide opportunities to apply the learning through a variety of individual and group-based learning activities;
- engage participants in a network of like-minded peers confronting the same real-life challenges in their careers and organizations.

Sub-topics covered include: the ideal donor profile for each type of gift, timing issues, how to describe the impact of the gift, valuation and receipting requirements, marketing tips, recommended paperwork and policies, ethical quandaries, real-life case studies, potential pitfalls, and much more.

What have past participants said?

"Not only did the Original Canadian Gift Planning Course introduce me to a strategic gift planning program, giving me a wealth of applicable knowledge and skills, it also left me with a network of colleagues across the country and in a variety of different charitable sectors who I can call on in the future for advice and support."

- *Emily Smith, Confederation Centre of the Arts*

"The course was exceptionally planned, intensive, and informative. I made important connections with colleagues in the sector and learned a ton. I gained a deeper understanding of technical topics and I feel more integrated into the broader Canadian charitable community."

- *Arden Burrows, Aqueduct Foundation*

"For anyone interested in learning about all of the ins and outs of gift planning, this is a must attend course. The knowledge, information and real life examples presented have greatly increased my own knowledge of not just bequest gifts, but all of the many ways donors can structure a gift to the charities they love."

- *Shelley E.*

"A course well-presented and organized, time and money well invested!!! The material and content covered is relevant, informative, and applicable, and it is done in a way that facilitates the building of connections between the participants to further develop beneficial professional relationships."

- *Bold Kéré, Estate Advisor, Canadian National Christian Foundation (CNCF)*

"One of the best professional development courses I have ever attended."
Richard Lefebvre, The National Ballet of Canada

"This course was everything I hoped it would be and more. Not only have I come away with new knowledge and skills to help me both professionally and personally, I am more confident about being able to provide better assistance to our donors."

"Would highly recommend this course to anyone who is looking to introduce a PG program into their organization. The intense format is perfect for learning and the real life examples were a great help."

Why take this course?

- The competition for ‘today’s dollars’ is intense. The competition for ‘tomorrow’s assets’ is even more intense. Be able to offer your donors an alternative: a deeply meaningful way to pass on their values and assets for your organization’s mission.
- Be ready to respond to donors who are becoming more sophisticated and savvy about charitable giving options.
- Be updated on changes to the regulatory and legal framework for charitable giving.
- More professional advisors are raising (or wish to raise) the topic of strategic philanthropy with their clients and may approach charities to learn more. Learn how to develop meaningful relationships with advisors.

Who should attend?

This course is designed for:

- **fundraising professionals who are responsible for developing gifts from individuals (annual, major, and planned)**
- **Charity executives, Board members who want to understand the ethical, legal and administrative considerations of a gift planning program**
- **Professional advisors who believe in community, holistic client service, and best practices for their philanthropic constituents**

How does this course compare to CAGP Foundation’s Strategic Gift Planning Bootcamp? **CAGP Foundation’s Bootcamp** focuses primarily on the practical aspects of gifts and incorporating gift planning into conversations with prospects and donors. The **Original Course** delves deeper into the administrative, technical and management aspects of a gift planning program.

Graduates of CAGP Foundation’s Bootcamp will find this course takes them to the next level: starting or managing a gift planning program with realistic benchmarks and expectations.

What are the learning objectives?

(In other words – if you attend this course, here’s what you can expect.)

- Expand and deepen your knowledge of giving options (for gifts now or later).
- Learn the importance and advantages of focusing on gifts of assets
- Be comfortable and confident in raising and discussing various gift options with donors, professional advisors or other charity colleagues and volunteers.
- Understand the unique obligations of a charity beneficiary and how to ensure excellent management and administration to maximize revenue and manage risk.
- Participate in a stimulating, challenging and informative learning experience
- Increase your network of fundraising professionals.
- Leave with a binder full of practical resources including templates, tools, tips along with a personal action plan.

We purposely limit the number of participants in each course, so faculty can deliver personalized service and to ensure everyone is able to participate in classroom discussions – to gain the greatest results. **So, don't be disappointed: register early!**

Who will be teaching the course?

Original Course faculty members have taught many CAGP Gift Planning courses and have direct experience as professional advisors or planned giving professionals. Please visit our website to see our faculty for the 2024 Original Canadian Gift Planning Course.

How much does the course cost?

Please visit our website to see cost of tuition, accommodation and meals.

Where will it be held?

This course is offered annually, alternating between eastern and western Canada. The next Original course will be held at the Banff Centre in Banff, Alberta February 12-16, 2024.

Will I receive CE credits for this course?

Yes, the course will offer up to **31.75** CFRE credits and 15 CE credits toward the MFA-P relicencing.

How can I get more information or register?

Please visit our website.

Contact:
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