2024 Schedule

Education Sponsor

THE DONOR MOTIVATION PROGRAM®

We Motivate Planned Giving!

CFRE

CERTIFIED FUND RAISING EXECUTIVE

Approved Provider for Continuing Education 2024

Full participation in CAGP's 30th National Conference on Strategic Philanthropy is applicable for up to 20 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Remember! As a CAGP member, you receive a 20% discount off of your CFRE certification or recertification!

MFA-P™: This course offers up to 9 hours credit for MFA-P™ re-certification.

The Institute™ for Advanced Financial Education

Some sessions are Institute accredited (up to 10.25 CE credits).

Tuesday | Wednesday | Thursday | Friday

07:30

07:30 - 17:00

GIFT PLANNING FUNDAMENTALS

PRE-CONFERENCE SESSION

Are you new to gift planning and want to learn the basics? Are you an executive director or board member who is interested in starting a gift planning program at your charity but need to learn more before 'jumping in' Or, perhaps you want to add some gift planning 'tools and techniques' to support your donors in expanding and enhancing their philanthropy.

If so, this course is exactly what you need.

Whether you are new to gift planning or in need of a solid refresher, the CAGP Foundation's Gift Planning Fundamentals is a one-day introductory course that will give you the boost you need to thrive in your career.

More details

07:30

07:30 - 16:30

THE ADVANCED CANADIAN GIFT PLANNING SUMMIT

CAGP FOUNDATION PRESENTATION

The Advanced Canadian Gift Planning Summit is the meeting place for industry-leading expert advisors and fundraisers engaged in philanthropy. It is where philanthropic planning meets tax, finance, insurance, succession and estate planning.

Incorporating interactive and in-depth presentations and discussions on current topics, this gathering of advanced professionals provides a unique opportunity to study the highest level of philanthropic strategy for the biggest and most complex gifts being planned in Canada and globally.

*Sponsored by **KBF Canada** and **Benefaction Foundation***

More details

13:00

13:00 - 18:00

CONFERENCE REGISTRATION OPENS

17:00

17:00 - 17:45

SPONSORED SESSION: CANADA LIFE MY PAR GIFT – A SIMPLE, SINGLE PAY, PARTICIPATING LIFE INSURANCE POLICY DESIGNED FOR CHARITABLE GIVING

*Sponsored by **Canada Life***

Create new opportunities to enhance your donors' gifts with Canada Life's My Par Gift. An industry-first life insurance solution exclusively designed for the charitable sector. During our time we will go through how the solution is structured while also diving deeper into two case studies that will illustrate the benefits to individual and corporate donors.

SPEAKER: EVAN CONNELL

17:30

17:30 - 18:30

FIRST TIMERS RECEPTION

*Sponsored by **Benefaction***

Tuesday Wednesday Thursday Friday

07:00

07:00 - 08:00

REGISTRATION OPENS + BREAKFAST

08:00
08:00 - 00:00

LAND ACKNOWLEDGEMENT / OPENING THOUGHTS AND REFLECTIONS

SPEAKER: MONIQUE MANATCH, ANISHNABE ALGONQUIN KNOWLEDGE KEEPER

08:00
08:00 - 09:00

PLENARY: GENEROSITY AS AN INTERVENTION TO SCARCITY: RECOGNIZING AND HEALING MONEY TRAUMA FOR MORE MEANINGFUL, EFFECTIVE FUNDRAISING RELATIONSHIPS

Sponsored by ***BMO Private Wealth***

Join Trauma of Money's co-founder and CEO, Chantel Chapman for this insightful talk exploring the psychology of scarcity and how charitable giving can be an intervention to minimize this restrictive lens around money.

Scarcity impacts the brain similarly to trauma and does not differentiate between perceived scarcity and actual scarcity. In this session, we will explore research-based ideas about how:

- Our economic system inherently orients us in scarcity and may impact our ability to give
- Scarcity impairs executive functioning including fluid intelligence, decision-making, and impulse control
- Common money disruptions and how to disempower them (e.g. financial avoidance, excessive risk aversion, underspending)

SPEAKER: CHANTEL CHAPMAN

09:15
09:15 - 10:45

MORNING SESSIONS A - 90 MINS

6 different sessions to choose from:

1.1. DEEP DIVE SESSION: COMPREHENSIVE PLANNED GIVING PROGRAMMING - PART 1

Sponsored by ***BC Children's Hospital Foundation***
Education level: Intermediate
Topic stream: Marketing & Communications

Take the plunge - learn how to create a compelling Planned Giving Program to reach your goals and support your mission. Marketing, communication, engagement and stewardship are all essential components of success, and during this "deep dive", we will take a good look into each of these four areas. Participants will walk away with helpful marketing tools, outreach ideas, stewardship plans and lead-generating activities that can be scaled up or down accordingly. This year's theme is "Convergence of Generosity," but do all the components of your Planned Giving Program work together to support a unified whole? Learn how to build an integrated planned giving program that will support your success now and in the future.

SPEAKER: HOLLY GREATREX, BA/21, CFRE

1.2. HOW TO GET THE ATTENTION OF SENIOR LEADERS ABOUT THE VALUE OF PLANNED GIVING

Education level: Intermediate
Topic stream: Know your Charity

Do you have difficulties engaging your board and senior leadership in the value of planned giving? Would you like to learn how planned giving got World Vision Canada's immediate attention of our new VP of Philanthropy, Rockwell Dundas? Along with Rockwell Dundas, the Director of Philanthropy and Engagement, Laurie Lowe and Manager of Planned Giving, Trina Owens would like to share how you can inspire and demonstrate the future legacy impact to your volunteer board members and senior leadership in your organization on the charitable business need for the investment in planned giving.

SPEAKERS: ROCKWELL DUNDAS, MBA, LAURIE LOWE AND TRINA OWENS

1.3. REGISTERED CHARITIES MAKING GRANTS TO NON-QUALIFIED DONEES: WHAT DOES THIS REALLY MEAN FOR US?

Education level: Intermediate
Topic stream: Legal Issues & Ethics

There has been much interest in our sector around the 2022 Income Tax Act Amendment to provide an alternative option for Canadian registered charities to work with non-registered charities and organizations abroad, specifically permitting registered charities to make disbursements to organizations that are not qualified donees. Will this allow an enhanced convergence of generosity for registered charities, donors and grantees? For many of us in the sector it's still not clear what it might mean for our work. This discussion will bring together people with experience and expertise in the area.

SPEAKERS: BENOÎT FONTAINE, MOHAMED HUQUE AND SUSAN MANWARING

1.4. DEATH - THE FINAL TABOO

Education level: General
Topic stream: Building Relationships

Death is universally shared and we're all going to experience it. Yet, it is undeniably still taboo and not likely to be discussed at your next dinner party. We put death comfortably behind a privacy curtain to let others deal with the messiness and awkwardness. However, the legacy fundraising professional whose task it is to work with a donor about imagining "what ifs" after their certain demise and have them get excited about it, has a tough job. Yikes! Venture into death related conversation with confidence. You might even use the "d" word!

Institute accredited CE (1.5 credits)
Continuing Education Sponsor: ***ADVOCIS***

SPEAKERS: JENNIFER BENEDICT AND JANICE ST-DENIS

1.5. LOOKING AFTER LEGACIES: CONTINUING THE CONVERSATION

Education level: Introductory
Topic stream: Legal Issues & Ethics / Building Relationships

With the growth of planned giving programs among charities, more fundraisers are engaging in the "planned gift" conversation with donors. This increase in planned gift solicitations is wonderful for the charitable sector, and provides a timely opportunity for GP professionals to coach and collaborate with fundraising partners.

Honouring donor intentions is an essential component of our ethical duty as gift planners and estate gift administrators. Occasionally, in the face of a donor-centred approach, we need to be the guiding compass for our colleagues, donors and estate trustees to ensure that the legacy intention is successful. Through case examples and roundtable discussions, you will learn about strategies for leading these conversations. Join us to hear new ideas and build your confidence around how to engage interested parties both internal and external to the charity as we look after legacies.

SPEAKERS: CHRISTINA PARFITT, CFP® AND MICHELLE PRUEFER

1.6. LEAVING A LEGACY - 3 FAITHS, ENDLESS POSSIBILITIES

Education level: Intermediate
Topic stream: Building Relationships

Do Muslims, Christians, and Jews approach legacy giving the same way? A trio of Jewish, Muslim and Christian fundraisers explain what you need to know about bequests and other gifts within each of our faith communities. Research demonstrates that actively religious donors give and volunteer the most, and to a variety of causes. So much in common, and yet our three faith traditions approach legacy giving with different emphases and gift vehicles. A safe place to ask questions about faith and planned giving is a gift we offer to the fundraising community.

SPEAKERS: ANN ROSENFIELD, MBA, CFRE, IMAM IRSHAD OSMAN, MSC, CFRE AND DR. LORI GUENTHER REESOR

10:45
10:45 - 11:15

BREAK + EXHIBIT HALL NETWORKING LOUNGE

Time to refresh, network and meet exhibitors.

11:15
11:15 - 12:15

MORNING SESSIONS B - 60 MINS

6 different sessions to choose from:

2.1. DEEP DIVE SESSION: COMPREHENSIVE PLANNED GIVING PROGRAMMING - PART 2

Sponsored by ***BC Children's Hospital Foundation***
Education level: Intermediate
Topic stream: Marketing & Communications

Take the plunge - learn how to create a compelling Planned Giving Program to reach your goals and support your mission. Marketing, communication, engagement and stewardship are all essential components of success, and during this "deep dive", we will take a good look into each of these four areas. Participants will walk away with helpful marketing tools, outreach ideas, stewardship plans and lead-generating activities that can be scaled up or down accordingly. This year's theme is "Convergence of Generosity," but do all the components of your Planned Giving Program work together to support a unified whole? Learn how to build an integrated planned giving program that will support your success now and in the future.

SPEAKER: HOLLY GREATREX, BA/21, CFRE

2.2. GIFT PLANNING 101
Education level: Introductory
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

This session is designed to give a high level, broad overview of gift planning to those new to the field. We will discuss differences between planned giving and other modes of fundraising as well as review the key terminology and basic understanding to make the most of other sessions at the conference. We'll arm you with practical ideas, brand new data from our sector and resources to jumpstart your understanding of planned and strategic giving.

SPEAKER: BETH PROVEN AND PAUL NAZARETH

2.3. A DEEPER DIVE INTO "QDs" (QUALIFYING DISBURSEMENTS) AND "DQs" (DISBURSEMENT QUOTA RULES)
Education level: Experienced
Topic stream: Legal Issues & Ethics

Unlike a DQ Sandwich from Dairy Queen that is predictable and satisfying, the murky and evolving world of QDs (Qualifying Disbursements) and DQs (Disbursement Quota Rules) under the "Income Tax Act" is neither predictable nor very satisfying. This session will explore a number of the complexities and challenges associated with both the new regime of Qualifying Disbursements and its practical impact on charities, as well as a discussion of the changes and challenges arising from the increased Disbursement Quota and related rules for charities and their interrelationship with the Qualifying Disbursement Regime. Attendees will gain a clearer understanding of the technical issues that gift planners and allied professionals will need to know when advising clients on what charities can and cannot do with regards to these rules and their impact on gift planning.

SPEAKER: TERRANCE CARTER

2.4. PLANNED GIVING MARKETING: GROWING YOUR POOL OF DONORS REQUIRES A DIFFERENT APPROACH
Education level: General
Topic stream: Marketing & Communications

What kind of results do you expect from your planned giving marketing? In this session, we challenge the conventional thinking that PG marketing should always result in qualified leads. Hear how some charities are moving towards a more integrated marketing strategy, where captivating content and engagement are key to growing their pool of donors. Our panelists share the tactics they've used, the results they've seen, and how to get organizational buy-in.

SPEAKERS: LAURIE FOX, BARBARA CHAMBERS, DANIELLE GAGNER AND LAURA RUMBLE

2.5. CONVERGENCE: THE INTERSECTION OF FUNDRAISING AND FINANCE
Education level: General
Topic stream: Not About Gift Planning

Join Gordon Holley and Kathy Arney to explore how financial sustainability and fundraising strength work together to enable social purpose organizations to maximize their impact. Learn the challenges organizations face, how finance and fundraising teams can collaborate, and key finance and fundraising strategies for building more sustainable and impactful organizations. Gordon and Kathy are both CPAs who work in the social purpose sector - Gordon heads a firm focused on building internal financial capacity, while Kathy leads a fundraising and capacity-building firm. By working together, these two leading professionals will provide the insights for non-profits to converge finance and fundraising to enhance long-term sustainability for their organizations and maximize the value of their fundraising efforts. Learn how to create an environment of cooperation and collaboration for a more stable and impactful future.

SPEAKERS: GORDON HOLLEY, CPA, CA, FCPB AND KATHY ARNEY, MFA-P, CA, CPA

2.6. BATMAN, ROBIN AND ALFRED: HARNESSING THE TALENTS OF YOUR WHOLE TEAM
Education level: General / Intermediate / Experienced
Topic stream: Know your Charity

Everyone who works for a charity is a fundraiser. But sometimes, our diverse super-powers mean that we have trouble understanding each other and working together as effectively as we can. In this session, we will explore how front-facing staff can engage the rest of the team, and how database, research, operations and administrative staff can bring their full suite of talents to the table. We'll talk DiSC styles, introverts and extroverts, how to use data to improve your programs, and, most importantly, help you build a happier, more satisfying work environment for everyone on your team.

SPEAKER: JENNIFER M. WALTON, CFRE

12:30
12:30 - 13:30

PLENARY/LUNCH - 2024 CAGP TABLE TALKS

Sponsored by ***KBF Foundation Canada***

You asked for more networking and connection and we listened! Join us for a lunch and learn, moderated by your CAGP peers, where you will share ideas, perspectives, news and views with like-minded colleagues on a variety of topics.

13:30
13:30 - 14:15

BREAK + EXHIBIT HALL NETWORKING LOUNGE

Time to refresh, network and meet exhibitors.

14:15
14:15 - 15:15

AFTERNOON SESSIONS A - 60 MINS

6 different sessions to choose from:

3.1. LEARNING TAX FOR THE NON TAX GIFT PLANNER!
Education level: General / Introductory
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

By definition, gift planning involves the careful thought of all of the aspects of the gifting property. While statistics say that donors think very little of the consequences of their gift, their trusted financial advisors do! Financial advisers are often the gate keepers to the real wealth of donors, gift planners needs to develop a tax "vocabulary" so they can make sure the gift makes sense for their organization, and to inform the organization's own advisers. This interactive session will help build that working vocabulary by outlining the key tax concepts, and having attendees pull those concepts from case studies.

SPEAKER: DEWAYNE OSBORN, CPA, CGA, CFP, MFA-P

Institute accredited CE (1 credit)
Continuing Education Sponsor: ***ADVOCIS***

3.2. "ON THE DESK" DONOR RELATIONS FOR ED/CEOS
Education level: Experienced
Topic stream: Know your Charity

This session places gift planning and major gift conversations directly on the CEO's desk--especially for small shops. We'll talk about ways that a CEO can advance relationships with donors in ways that other staff members cannot. We'll also explore ways to keep advancement work front and center, in spite of the demands of the role.

SPEAKER: SANDRA BAKER, BA, CFRE

[3.3. REVOLUTIONIZING LEGACY GIVING: THE POWER OF ONLINE WILLS FOR CHARITIES]

Education level: Introductory / Intermediate
Topic stream: Know your Charity / Marketing & Communications

In today's digital age, online Wills have become a powerful tool for individuals and nonprofit organizations. This session will provide you with an in-depth understanding of the strategies and techniques involved in soliciting and securing legacy gifts through online Wills. Daniel Goldgut, Epilogue Wills, and Jackie Mersereau, the Nature Conservancy of Canada will help you understand the potential online Wills have to increase bequest confirmations to your organization.

SPEAKERS: DANIEL GOLDGUT, J.D. AND JACKIE MERSEREAU

3.4. GIFTS IN-KIND AFTER DEATH

Education level: Intermediate
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life** / Legal Issues & Ethics

Canadians donate both time and money to charities, contributing to our society's well-being. In addition to monetary gifts, gifts in-kind can be donated to charity with taxable benefits to the donor. This session will focus on gifts in-kind, including gifts of private and public company shares, ecological gifts, Canadian cultural property, real estate, art, cryptocurrency, and NFTs, made by an estate. We will examine the special rules for donations made after death, and aim to equip the advisor, the executor, and the charitable organization with the tools to tackle the challenges that arise from these types of gifts.

SPEAKERS: BRITTANY SUD AND ELENA HOFFSTEIN

Institute accredited CE (1 credit)
Continuing Education Sponsor: ***ADVOCIS***

3.5. SHIFTING THE PARADIGM: CENTERING IMPACT AND EMPOWERING FRONTLINE FUNDRAISERS FOR MEANINGFUL ENGAGEMENT

Education level: Intermediate
Topic stream: Building Relationships

In the movement towards community centric fundraising, fundraisers have a responsibility to decenter donors. Unfortunately, we have been trained to take a donor centric approach and now have to unlearn much of what we know about fundraising. As a fundraiser, Elisa Williams Schroen was trained to take a donor centric approach. Now as the Manager of Philanthropy, FDC Foundation, she experiences fundraisers taking this approach and failing to engage the foundation or create meaningful partnerships. Participants will leave with practical strategies that prioritize authentic and meaningful engagement to foster stronger relationships, trust, and collaboration between fundraisers and donors.

SPEAKERS: ELISA WILLIAMS SCHROEN, CFRE AND ELI CLARKE

3.6. WHAT'S NEXT? HOW TO ENGAGE AND CONVERT YOUR LEGACY PROSPECTS OVER TIME

Education level: General / Intermediate
Topic stream: Marketing & Communications

You've built a pipeline of supporters who are willing to consider a planned gift – great! But... now what? How can you systematically cultivate your legacy prospects year after year? What can you do to help motivate and inspire them to take action? How can you find out if they've made a decision in a sensitive way? This session outlines how to create a repeatable, systematic 2-year engagement plan and covers lots of ideas for touchpoints and content to keep prospective legacy donors moving forward in their decision-making while deepening your relationship and their connection to the cause.

SPEAKER: AIMÉE LINDENBERGER, CFRE

15:30
15:30 - 16:30

AFTERNOON SESSIONS B - 60 MINS

6 different sessions to choose from:

4.1. NUDGES THAT IMPROVE LEGACY MARKETING

Education level: Intermediate
Topic stream: Marketing & Communications

Unlike major gifts, marketing legacies is an ongoing and continuous process that gently nudges donors towards the decision. A quick review of legacy documents reveal outdated and jargon-heavy marketing that leave donors confused and uninspired. This session aims to shares some basic elements of behaviour science where nudges have being used in legacy marketing. We'll discuss nudges that you must use and those you must avoid at all cost. We'll also explore what donor psychology and behavioural science research tells us about how donors make decisions and how you can harness this information to craft deeply personal and impactful legacy marketing materials that will inspire and nudge donors towards that joyful YES!

SPEAKER: LIGIA PEÑA, CFRE

4.2. IMPACT OF THE NEW ALTERNATIVE MINIMUM TAX (AMT) REGIME ON LARGE GIFTS AND THE CHARITABLE SECTOR

Education level: Introductory / Intermediate
Gift Planning Vehicles - Sponsored by **Canada Life**

The federal government, in the 2023 budget, has proposed changes the Alternative Minimum Tax (AMT) system as part of their commitment to ensure that high earners pay their fair share of tax. High-net worth individuals who plan to donate publicly listed securities to charities may be impacted by upcoming changes that are intended to come into force on January 1st, 2024. The session will go over what charities must know i.e. explain how AMT works, go over the proposed revisions and how it may impact donors, provide examples and discuss how this may affect philanthropy.

SPEAKER: ALEX KERSLAKE

4.3. CULTURAL ALCHEMY: POWER OF COLLABORATION ON SOUTH ASIAN LEGACY GIVING INITIATIVE

Education level: Intermediate
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life** / Marketing & Communications

A case study involving collaboration between Royal Ontario Museum (ROM) presented by Janice Correa and Advisory Money Strategies Inc (AMS), a boutique Estate Planning firm presented by Chanchal (Sisi) on how the advisory firm partnered with ROM on their South Asian Legacy Giving Initiative to build a bridge between Donors and Donees, specifically those of South Asian heritage. It highlights supporting data, strategic plans, and actionable tactics on a transformative process of combining cultural elements, values, and traditions to promote meaningful impact and enduring legacies by South Asians. It addresses acknowledgement of inclusivity and honoring of various cultures and identities present within the Community itself. The partnership underlines importance of working together to advance understanding of Legacy giving, with special emphasis on generational giving and utilization of life insurance as a key giving vehicle. A deep dive on integrating donor events and advisor presentations with South Asia and its culture in mind, shifts perspective to resonate deeply within the cultural fabric of the South Asian community. AMS brings forth simple planned giving strategies for the average donor by "Making Giving Simple" while assisting ROM preserve culture, for generations to follow.

SPEAKERS: CHANCHAL CHAKRABARTI, CLU, CHS, MFA-P AND JANICE CORREA

4.4. ESTATE ADMIN OFF THE SIDE OF YOUR DESK - PRACTICAL INFO YOU CAN USE!

Education level: Introductory
Topic stream: Know your Charity

Estate Admin in a small shop or off the side of your desk. Practical information that you can take back and implement. Know what you are entitled to ask for, what to expect, how to spot red flags. Know what to look for in a Release, Acknowledgement, or accounts. Is a Release even necessary? Know that it is okay to ask questions and reach to out to other charitable beneficiaries and collaborate!!!

SPEAKER: CHRISTIE GEEN-DIFEDE

4.5. SOS! - RESCUING AN INTENDED TESTAMENTARY CHARITABLE GIFT IN DISTRESS

Education level: Intermediate
Topic stream: Legal Issues & Ethics

Many testators have good intentions. Sometimes those intentions run into problems after death. What happens when circumstances threaten the realization of a testator's philanthropic goals? Using statute and jurisprudence, this session will explore some of the "rescue" techniques available to save a testator's charitable intentions when those intentions are in distress. Situations covered will include charitable gifts in a testator's "Will" that does not comply with the necessary formalities for a valid Will, and when a testamentary charitable gift is impossible or impractical to carry out.

SPEAKER: TOM GROZINGER

4.6. FUTURE PLANNING: USING A GIVING VEHICLE TO MAKE IMPACT INVESTMENTS

Education level: Experienced
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

In this workshop session you will learn how to work with donors to make impact investments. As impact investing continues to rise in popularity, especially as a philanthropic strategy, stay current on what is/is not permitted under Canadian ITA, guidance from CRA and implications on DQ, gift and investment structuring options, and more. You will leave with a better understanding of impact investment options and the technical details needed to better serve your clients.

SPEAKERS: SUSAN MANWARING AND ADAM JAGELEWSKI

Institute accredited CE (1 credit)
Continuing Education Sponsor: ***ADVOCIS***

16:30
16:30 - 17:30

WELCOME RECEPTION

Sponsored by ***Good Works***

Join us for an alcohol-free reception, with a mocktail sponsored by the CHEO Foundation.

17:30
17:30 - 18:30

PARTNERS & DONORS RECEPTION

Sponsored by ***Cardinal Capital Management*** *and* ***CAGP Foundation***

18:30
18:30 -

DINE AROUND EVENT

Join us for an optional outing to relax and meet new people.

18:30
18:30 -

COCKTAIL RECEPTION / FIRESIDE CHAT WITH WCPD FOUNDATION

Join us for an optional evening reception sponsored by WCPD Foundation.

Tuesday Wednesday Thursday Friday

07:00

07:00 - 08:00

REGISTRATION OPENS + BREAKFAST

07:00
07:00 - 07:45

EARLY BIRD SPONSORED SESSION: WHERE TAX & FINANCE MEET PHILANTHROPY

Sponsored by ***PearTree***

This exclusive Early Bird Session with PearTree Canada's Founder & CEO, Ron Bernbaum will dive into the unique Canadian landscape of Tax as it relates to Philanthropy. Tailored for fundraising and gift planning professionals, this session will explore real-life scenarios, spotlighting the impact of recent changes to the Income Tax Act on the Canadian Charitable Sector. Ron will guide the audience through these changes, providing insights and practical solutions for navigating these changes. Join in for a special focus on the Flow-Through Share Donation platform, as Ron speaks about leveraging it as a powerful tool for fundraisers and gift planners in their fundraising toolkit, empowering donors to accelerate their charitable giving.

SPEAKERS: RON BERNBAUM

Institute accredited CE (.75 credits)
Continuing Education Sponsor: ***ADVOCIS***

08:00
08:00 - 09:00

PLENARY: FROM CHARITY TO CHANGE IN CANADIAN FOUNDATIONS

Sponsored by ***Aqueduct Foundation***

Are you curious about how foundations are changing their focus and strategies in a rapidly evolving philanthropy landscape in Canada? Join three experienced foundation leaders and observers of this landscape as they discuss and share new approaches to collaboration and partnership.

SPEAKERS: HILARY PEARSON, ARTI FREEMAN AND VANI JAIN

09:15
09:15 - 10:45

MORNING SESSIONS A - 90 MINS

6 different sessions to choose from:

5.1. DEEP DIVE SESSION: 12 WAYS TO BE MORE INCLUSIVE AND MORE - PART 1
Sponsored by ***BC Children's Hospital Foundation***
Education level: Introductory / General
Topic stream: Building Relationships / Not About Gift Planning

Looking for more ways to be more inclusive and continue the conversation? Join me for a deeper discussion on 12 ways to be more inclusive (and more) in your life and work. We will discuss how to use these basic tools to build a more inclusive workplace and society. Bring your questions, concerns and let's discuss why we need to be more inclusive. Bring your ideas and successes and tell us how your workplace has championed inclusion. Add to the list and let's make philanthropy a better industry to work in.

SPEAKER: JAYA MOOTOO

5.2. MAPPING IT OUT AND HITTING THE ROAD WITH YOUR LEGACY PROGRAM
Education level: Introductory
Topic stream: Know your Charity / Marketing & Communications

It's time to hit the road! With so many giving vehicles, marketing tools, and audiences to consider reaching the ultimate destination, it can be challenging to get started. In this session, we'll look at our past trips to help plan what you need in your suitcase before you hit the road. Then we'll build a map of routes, highlighting differences for small cars vs. sedans, solo drivers, or those with a passenger. You'll leave the session with a plan and road map you can implement right away to get your legacy program out of the garage and enroute!

SPEAKERS: CHRISTY SOHOLT, CFRE AND LAURA SVAJLENKO, CFRE

5.3. SHIFTING TO AN INDIGENOUS-LED AND INSPIRED FUND DEVELOPMENT MODEL: WANUSKEWIN'S JOURNEY TO UNESCO
Education level: General
Topic stream: Building Relationships

Wanuskewin, an Indigenous-led organization on a journey to become Saskatchewan's first UNESCO World Heritage Site by 2025. Along the way, the organization is taking thoughtful steps to build a different kind of fund development strategy – shifting to an Indigenous-led and Inspired Fund Development model. As we take thoughtful steps to integrate Indigenous ways of knowing and conventional fundraising practices, we're listening—to the land, the ancestors, and each other—and learning many lessons along the way. It's messy and challenging, but all learning is. This session will share the journey, the learning, the struggles, and invite conversation and dialogue.

SPEAKERS: KATHY ARNEY, MFA-P, CA, CPA AND CANDACE WASACASE-LAFFERTY

5.4. CONVERGENCE OF VOICES: EMPATHIC STORY GATHERING & EFFECTIVE STORY SHARING
Education level: General
Topic stream: Marketing & Communications

Stories are at the heart of any legacy giving program. How do you gather compelling, courageous impact and donor stories, while approaching sensitive subjects and vulnerable voices with empathy and integrity? How do you conduct conversations in ways that make you feel confident and connected to your subject and your organization? How do you cultivate your own curiosity about what makes a great story: one that resonates with your values and inspires you to find and share more and more stories?

SPEAKER: JEN LOVE

5.5. ETHICAL BEST PRACTICES IN ESTATE GIVING
Education level: Intermediate
Topic stream: Legal Issues & Ethics

Complex? We bet you've said that multiple times if you are working within the sphere of legacy giving; either while exploring a new gift or working through a realized estate gift. Estate gifts have much more stringent legal and financial oversight than gifts from a living individual. Have you encountered questions where you didn't know the answers? Did you often wonder where you might go to find out what your options were? If so, we encourage you to join us as we work through two complex estate case studies while exploring helpful tips on handling delicate conversations with executors, family, lawyers and loved ones.

SPEAKERS: VICKI HAYTER

Institute accredited CE (1.5 credits)
Continuing Education Sponsor: ***ADVOCIS***

5.6. WORKING COMMUNITY-CENTRED PHILANTHROPY INTO YOUR GIFT POLICIES AND TEMPLATES
Education level: Experienced
Topic stream: Legal Issues & Ethics

Community-centred philanthropy is a paradigm that focuses the gift planning and fund administration process primarily on the impact and benefit to communities and causes, rather than primarily on the wishes and rights of the donor. This session will explore how to move community-centred philanthropy from philosophy to practice by integrating principles into gift policies and template gift documents.

SPEAKER: MICHAEL BLATCHFORD, LLB, BA

10:45
10:45 - 11:15

BREAK + EXHIBIT HALL NETWORKING LOUNGE

Sponsored by ***Carters Professional Corporation***

Time to refresh, network and meet exhibitors.

11:15
11:15 - 12:15

MORNING SESSIONS B - 60 MINS

6 different sessions to choose from:

6.1. DEEP DIVE SESSION: 12 WAYS TO BE MORE INCLUSIVE AND MORE - PART 2
Sponsored by ***BC Children's Hospital Foundation***
Education level: Introductory / General

Topic stream: Building Relationships / Not About Gift Planning

Looking for more ways to be more inclusive and continue the conversation? Join me for a deeper discussion on 12 ways to be more inclusive (and more) in your life and work. We will discuss how to use these basic tools to build a more inclusive workplace and society. Bring your questions, concerns and let's discuss why we need to be more inclusive. Bring your ideas and successes and tell us how your workplace has championed inclusion. Add to the list and let's make philanthropy a better industry to work in.

SPEAKER: JAYA MOOTOO

6.2. TRADITIONAL TO TRANSFORMATIONAL: LEVERAGING THE POWER OF DIGITAL MARKETING

Education level: General
Topic stream: Marketing & Communications

In recent years, the University of Toronto's Gift Planning portfolio has undergone a digital transformation. Rather than exclusively relying on traditional channels, we are now fully leveraging the power of integrated multi-channel marketing and communications to build awareness of and raise interest in gift planning as a meaningful way to make a difference. During this session, we will discuss how to diversify your channel mix, maximize your content, leverage data-informed insights to guide decision making, and generate qualified leads using paid digital advertising. We'll also share best practices, successes, and key learnings to help guide your own planning efforts.

SPEAKERS: MICHELLE OSBORNE, CFRE AND MELISSA PANG

6.3. CONVERGENCE AND CONNECTION - UNLEASHING THE COLLECTIVE POWER OF GIVING

Education level: Experienced
Topic stream: Building Relationships / Know your Charity

In my presentation, I will delve into the convergence of giving and how it relates to the coming together of various partner groups towards a common goal or shared purpose. It represents a shift from random and perhaps episodic acts of giving to a more strategic, intentional and collaborative approach that maximizes the impact of philanthropic efforts. Through the lens of Harmonia Philanthropy's PhilEx program, I will explore how strategic gift planning in collaboration with various professional advisors, can empower donors to achieve their philanthropic dreams while addressing the changing face of philanthropy, and the broader sector issues and trends charities and nonprofits face.

SPEAKER: LOIS GRAVELINE

6.4. THREE WAYS TO BOOST YOUR EMAIL ACQUISITION

Education level: General
Topic stream: Marketing & Communications

New email acquisition? Yes please! We all know emails can be a vital part of our communication toolkit, but how can we get more of those valuable emails to grow our prospect and donor base? We have three tried and true strategies to share – including one dedicated to planned giving!

SPEAKERS: ANGELA MAYER AND ERIN NAZARALI

6.5. GETTING MORE PLANNED GIFTS BY ASKING BETTER QUESTIONS

Education level: Introductory / Intermediate
Topic stream: Marketing & Communications / Building Relationships

What are your donors thinking? What are their concerns? What questions do you need to ask – and anticipate – to find out? How can you use better questions to raise more money, now and in the future? The key to successful fundraising is smarter questions… before, during, and after your interactions with donors. This new webinar is based on Harvey's bestselling book, 11 Questions Every Donor Asks and the Answers All Donors Crave. Perfect for both planned and major giving.

SPEAKERS: HARVEY MCKINNON AND KATIE DUDLEY

6.6. STRATEGIC TAX PLANNING WITH LIFE INSURANCE - FOR DONORS, ADVISORS & CHARITIES

Education level: Intermediate
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

Do you need your 2024 update on all things tax & estate planning. Learn from an expert that outlines what strategies are used, who is using them, and how charities can be the beneficiary. Tax can be complicated. Financial tools like life insurance can be a liquidity tool in the planning sector to help donors reach their objectives, equalize for their families and make their philanthropy goals happen in their plans. Life insurance can do that. Learn how.

SPEAKER: JOS HERMAN, CPA, CA, CFP, CLU, TEP

Institute accredited CE (1 credit)
Continuing Education Sponsor: ***ADVOCIS***

12:30
12:30 - 13:30

LUNCH PLENARY: TRUST, AND TRANSFORMATION: CANADIAN WOMEN AND PHILANTHROPY

*Sponsored by **Abundance Canada***

TD Wealth's groundbreaking 2014 report, Time Treasure and Talent, led to heightened interest on the important role women play in Canada's charitable sector, as leaders, donors and volunteers.

Ten years later, it was time to shine a light on the Canadian female philanthropist today. Research through interviews with donors, entrepreneurs, charity executives and volunteers, with an emphasis on speaking to women from diverse groups and LGBTQ2+, Indigenous and immigrant communities, was the basis for this new report.

Trust, and Transformation: Canadian Women and Philanthropy shows that Canadian women remain a driving force within the charitable sector, not only providing much-needed funding but, increasingly, driving systemic change.

Join this powerful plenary to hear from a panel of women changemakers who are shaping the future of philanthropy in Canada.

SPEAKERS: BETTY-ANNE HOWARD, M.S.W., B.A. (HON.), CLU, CHS, CEA (MODERATOR), JESS MERBER, SOPHIE PRESCOTT AND THERESA BUTLER-PORTER, MFA-P

13:30
13:30 - 14:30

DESSERT BREAK + EXHIBIT HALL NETWORKING LOUNGE

*Sponsored by **Carters Professional Corporation***

Time to refresh, network and meet exhibitors.

14:30
14:30 - 16:00

FRANK TALKS 2024: AS A SECTOR, WHO ARE WE SERVING?

*Plenary Sponsored by **Miller Thomson LLP***
*Recording & Public Release Sponsored by **Private Giving Foundation at TD***

Since 2016, this plenary series has pushed at the edges of pertinent and provocative issues facing Canada's charitable sector, pressing social issues and an evolving context of philanthropy, challenging delegates in their thinking and exploring audacious ideas that intersect with all our work and worlds.

In 2024, a persistent climate of deep polarization, inequity in wealth and its distribution, tensions between affluence and charity, growing need in a time of burnout and workforce upheaval, and a world facing environmental devastation, leads us to explore the bottom-line of As a sector, who are we serving?

This year's FRANK Talks speakers will bring perspectives from inside and outside our CAGP community on people power, the vital role of media as the fourth estate, and reflect on the balance between donor and community-centered fundraising as mindsets around philanthropy and generosity shift. Come to listen, think and share ideas so we can find solutions together and use what precious time and resources we have to not just facilitate philanthropy but tap into the roots of human generosity.

As always, speakers are invited to challenge us to consider the role we may play in preserving or prolonging unfair systems, and how we can contribute to a path towards equity and meaningful social change.

SPEAKERS: TANYA RUMBLE, DEVIKA SHAH, JENNY MITCHELL, JOEL BRAY, VINOD RAJASEKARAN AND TYLER BOYCE

18:00

18:00 - 19:00

BANQUET RECEPTION

Time to celebrate!

Sponsored by ***BC Children's Hospital Foundation***

19:00

19:00 - 22:00

BANQUET DINNER & 2024 FRIEND OF CAGP AWARD PRESENTATION

Banquet Sponsor: ***CIBC Private Wealth***
Friend of CAGP Award Presenting Sponsor: ***CI Assante Private Client***

Tuesday | Wednesday | Thursday | Friday

07:00

07:00 - 08:00

REGISTRATION OPENS + BREAKFAST

07:00
07:00 - 07:45

EARLY BIRD SPONSORED SESSION: CANADA'S CHANGING DEMOGRAPHICS AND ECONOMY AND THE INTERSECTION WITH LEGACY GIVING

Sponsored by ***Environics Analytics***

The demographics of Canada have changed dramatically over the past several decades. With the release of the 2021 Census, this session will dive into the current demographics of Canada – where are we at in 2024? In addition to demographics, with the rise in inflation and interest rates, cooling real estate prices, and a volatile stock market, we will also review the state of Canadian finances. Pulling these macro trends together, we will discuss these changes through the lens of legacy giving and generations.

SPEAKER: JENNIFER ROBINS

08:00
08:00 - 09:00

PLENARY: DATA FROM THE SILENT PHILANTHROPIST - WHAT DONORS WITH GIFTS IN THEIR WILLS ARE REALLY SAYING

Sponsored by ***KPMG Family Office***

The majority of donors with charitable bequests don't tell you that they have named you in their wills. So how do you steward them if you don't know who they are? And, what is the real potential among your other supporters who could become legacy donors if they got what they needed?

In this provocative address, from one of the most respected leaders in North American research, Penelope Burk shares insights from research conducted with over 7,700 active donors who offered their views on including gifts in their wills. You will hear data-driven insights into donors who have already included one or more charities in their wills: why they did it and when; who influenced them to take this step; how they chose beneficiaries (and why some donors have removed them from their wills); what they want from gift planners; what kind of communication and recognition resonates with donors and more donors with NO bequest but genuine interest; do age and other demographics matter when identifying potential bequest donors; what it takes to turn interest into action; donor awareness of planned gift marketing; impact of print, electronic and video promotion in engaging potential donors.

SPEAKER: PENELOPE BURK

09:15
09:15 - 10:45

MORNING SESSIONS A - 90 MINS

6 different sessions to choose from:

7.1. DEEP DIVE SESSION: A WORKSHOP & PANEL CONVERSATION - THE CONVERGENCE OF GENEROSITY & PRACTICALITY: HOW DOES FINANCIAL & CHARITABLE PLANNING WORK AND HOW TO LEVERAGE YOUR RELATIONSHIPS - PART 1

Sponsored by ***BC Children's Hospital Foundation***
Education level: Intermediate
Topic stream: Building Relationships

In this hybrid panel and workshop, Dilmini, Janine & Serena come together to examine how Financial Advisors work with their Wealth Planning teams to maximize financial charitable planning for their clients. We will also leave Charitable Professionals with practical tips for incorporating key donor/clients' questions to further your generosity conversations and how to apply these questions to real-life situations. There will be special workbook to help facilitate this conversation.

SPEAKERS: JANINE PURVES, DILMINI BONAS AND SERENA HAK, MFA-P

Institute accredited CE (2.5 credits)
Continuing Education Sponsor: ***ADVOCIS***

7.2. WE'RE NOT SUPERHEROES: THE PURSUIT OF BOUNDARIES, BALANCE, AND BEING HUMAN

Education level: General
Topic stream: Not About Gift Planning

Fundraising is personal fundraisers are passionate and tireless activists. Increased professional demands, diminishing organizational resources, and the rapid change to our work environments as we continue to recover from COVID (which extends beyond to the larger world we all live in) is leading to burnout and parent-worker guilt. This can extend past work and into personal lives, especially as partners and parents and caregivers. Join Jaya Mootoo, Holly Wagg, and Eli Clarke, in a conversation moderated by Rickesh Lakhani, to discuss their successes, failures, practical actions, strategies, and mindsets towards life-work balance.

SPEAKERS: ELI CLARKE, RICKESH LAKHANI, HOLLY WAGG, MA, CFRE AND JAYA MOOTOO

7.3. LEGACY CHALLENGE CAMPAIGNS: WHAT ARE THEY?

Education level: Introductory / Intermediate
Topic stream: Marketing & Communications / Building Relationships

Legacy challenge campaigns have been more prominent over the last few years, with impressive results across a wide array of non-profit organizations. This session will present two case studies on Legacy Challenge Campaigns: McGill University's 200 for 200 Legacy Challenge and The National Ballet of Canada's 70 for 70 Legacy Challenge. The speakers will describe how Legacy Challenges can be effective in meeting multiple fundraising goals and objectives, including: revitalizing a legacy giving program, galvanizing donor participation, increasing the average size of legacy gift commitments, unearthing existing legacy donors, and more...

SPEAKERS: RICHARD LEFEBVRE, CFRE AND CHRISTINA VROOM

7.5. THE POWER OF LEGACY VIDEOS

Education level: General
Topic stream: Marketing & Communications / Building Relationships

Legacy videos that profile the stories of existing Legacy donors may just be the single most effective starting point of any Legacy commitment or conversation. We are hardwired to engage with stories and stories demonstrate social norms, create a ""mirror"" effect with prospects and also dissolve their barriers to giving. And there is no greater medium to tell stories than video. Video conveys visual cues essential for drawing emotions, it engages viewers in, holding their attention spans and makes them feel invested in what's happening – we want to know how the story ends! And our brain loves video because it is programmed to retain visual content better than a page loaded with words. These are just a few of the many reasons that Legacy Videos work!

SPEAKER: MICHELLE BOWER CARTER

7.6. PRODUCTIVE CONVERSATIONS WITH DONORS ABOUT PLANNED GIVING: WHAT'S HOLDING YOU BACK?

Education level: Intermediate
Topic stream: Building Relationships

As fundraising professionals we can sometimes be the barrier to building fruitful relationships with potential legacy donors. We produce obstacles that keep us from engaging with the people who are willing and able to create a lasting legacy for our organizations. This interactive workshop will take you through the most common roadblocks to deeper conversations with donors. It will address your apprehensions and give you practical tools for taking discussions to the next level. All kinds of development professionals would benefit from attending, including managers who want to motivate their teams to be more confident in these conversations.

SPEAKERS: PEGGY KILLEEN, CFRE AND EMANUEL EUVRARD

10:45
10:45 - 11:15

BREAK

Time to refresh and network

11:15
11:15 - 12:15

MORNING SESSIONS B - 60 MINS

6 different sessions to choose from:

8.1. DEEP DIVE SESSION: A WORKSHOP & PANEL CONVERSATION - THE CONVERGENCE OF GENEROSITY & PRACTICALITY: HOW DOES FINANCIAL & CHARITABLE PLANNING WORK AND HOW TO LEVERAGE YOUR RELATIONSHIPS - PART 2

Sponsored by ***BC Children's Hospital Foundation***

Education level: Intermediate
Topic stream: Building Relationships

In this hybrid panel and workshop, Dilmini, Janine & Serena come together to examine how Financial Advisors work with their Wealth Planning teams to maximize financial charitable planning for their clients. We will also leave Charitable Professionals with practical tips for incorporating key donor/clients' questions to further your generosity conversations and how to apply these questions to real-life situations. There will be special workbook to help facilitate this conversation.

SPEAKERS: SERENA HAK, MFA-P, JANINE PURVES, CFP, CPCA AND DILMINI BONAS

Institute accredited CE (2.5 credits)
Continuing Education Sponsor: ***ADVOCIS***

8.2. THE POWER AND PRACTICE OF STORY LISTENING

Education level: General
Topic stream: Building Relationships

As gift planners we know the importance of story telling but rarely - if ever! - do we talk about story listening. In this session we explore why story listening is vital to our work. This session will touch upon the power of meaning making and giving space for legacy reflection along with the tools of active listening. Together, we'll open ourselves up to a different narrative and explore what could happen when we turn the focus from our story to their story.

SPEAKERS: MEGAN DOYLE RAY AND JANICE ST. DENIS, CFRE

8.3. NETFLIX & WILL: MARKETING LEGACY GIVING TO A MILLENNIAL AUDIENCE

Education level: Intermediate
Topic stream: Marketing & Communications

We've all spent the last 20 years marketing legacy gifts to prospects in their 60s. But the early days of the COVID-19 pandemic propelled a huge uptake in will-making – and most of those new wills are being made by Millennials and Gen X. In the years since, the legacy market has evolved! We'll unpack what it means to market legacy giving to a younger audience than ever before. From the impact of their long lifespans on our KPIs, to the way they'll influence revenue today and tomorrow, to the ways we need to evolve our marketing creative, giving options, and channel choices.

SPEAKERS: CHARLOTTE FIELD AND MELANIE SCHOLZ, CFRE

8.4. CAN AI HELP US BUILD A BETTER PLANNED GIVING PROGRAM?

Education level: Intermediate
Topic stream: Not About Gift Planning / Marketing & Communications

There's lots of talk about AI these days, and how it might affect jobs in the future. But with most non-profit staff already stretched thin today, can you leverage AI to improve your time efficiency and help you find more legacy donors? Join Ryan as he explores how AI can help, and how it can hurt your legacy fundraising program.

SPEAKER: RYAN GARNETT, CFRE

8.5. A PROMISE IS A PROMISE: UNDERSTANDING PLEDGED GIFTS

Education level: Intermediate
Topic stream: Legal Issues & Ethics

A donor's promise to make a charitable gift in the future is not a legally binding commitment. Yet charities often rely on such pledges as though they were binding. This session will examine the differences between pledges and gifts (with particular focus on their (un)enforceability) and how to document pledged gifts. We will discuss how and why charities might seek to enforce pledged gifts and the likelihood of success. Finally, we will take a closer look at other issues that might arise with pledged gifts, including donor advised funds and outstanding pledges on the death of a donor.

SPEAKERS: KATE BAKE-PATERSON, LLB AND ROGER LEE

8.6. A "CRITICAL" POINT IN HISTORY: HOW FLOW-THROUGH SHARES HELP DONORS GIVE MORE & SUPPORT OUR GREEN ENERGY FUTURE

Education level: Experienced
Topic stream: Gift Planning Vehicles - Sponsored by **Canada Life**

On April 7th, 2022, Chrystia Freeland, Deputy Prime Minister & Minister of Finance, announced Canada's Critical Mineral Strategy, a bold plan to find the raw materials needed for our low-carbon future. Cobalt, lithium, rare earths - these critical minerals, and many more, are the building blocks of electric car batteries, solar panels and wind turbines, and other technologies. So where do charity flow electric car batteries, solar panels and wind turbines, and other technologies. So where do charity-flow through shares fit in? Today, this trusted structure is responsible for approx. 75% of all junior mining exploration in Canada, while continuing to help major donors give more to charities of their choice. In this talk, Peter Nicholson will explain how major donors can not only reduce their taxes and donate more, but also participate in our green energy future.

SPEAKER: PETER NICHOLSON

12:30

12:30 - 14:00

CLOSING PLENARY: "THE LEGACY OF YOUR DASH"

Sponsored by ***Raymond James Canada Foundation***

Often, we hold the belief that our legacy is something only experienced by others after we've passed away. However, in reality, our legacy starts with the impact we make while we're still here - it's the smiles, the moments of joy, the opportunities we provide, and the shared moments we create with people during our lifetime. The question is, what will your "dash" represent? How will you give back what you've been given during your time on this Earth? This keynote weaves in poems and stories, and delves into the profound concept of the "dash" and WILL encourage us to reflect on the positive and lasting impact we can make in the world today, that will build the legacy we leave behind.

SPEAKER: RANDELL ADJEI

14:00

14:00 -

CLOSING THOUGHTS AND REFLECTIONS

SPEAKER: MONIQUE MANATCH, ANISHNABE ALGONQUIN KNOWLEDGE KEEPER

14:30

14:30 - 17:00

OPTIONAL SOCIAL ACTIVITY

Make the most of your time in Ottawa by adding on one or more of the social activity options available.