CAGP FOUNDATION

Strategic Gift Planning Bootcamp

AGENDA

October 27-30, 2020

Fairmont Le Château Montebello, Quebec

Tuesday, October 27	
5:00 p.m.	**Welcome & Introductions**
Evening	**Tips on Getting the Most Out of Bootcamp**
	CHAPTER ONE: A Primer on Principles • What is Philanthropy • The Charitable Landscape in Canada • Strategic Gift Planning – Donor-Centred Approach • The Philanthropic Flow • Your Role as a Charity-Based Gift Planner
	Creating Your Personal Learning Objectives Assignment - Developing Personal Learning Objectives for the course **Assignments & Case Studies** Review of the various assignments and case studies you will be working on throughout the course.
7:00 p.m.	Dinner

Wednesday, October 28	
7:00 – 8:30 a.m.	Breakfast
Morning	**CHAPTER TWO: Tax Aspects of Charitable Giving In Canada** • A Review of Basic Taxation and Terminology relating to Charitable Gifts • General Financial & Estate Planning Concepts • A Primer on Endowments and other funds
	Networking/Refreshment Break
	CHAPTER SIX: Gifts of Public Securities **Understanding Gifts of Public Securities (PS)** Overview of concepts, definitions, tax treatment and processes involved in explaining and accepting gifts of public securities, private shares and stock options (including the 'donate to eliminate' concept & donations through private holding companies).
	Checking In on Tax Aspects - Assignment Questions and Answers
12:15 – 1:30 p.m.	Lunch & Class Photo
Afternoon	**CHAPTER THREE: Emotional Intelligence** Creating Your Personal Mission Statement **CHAPTER FOUR: The Donor Profile** **Understanding the Gift Planning Donor Profile** Learn about the common characteristics of the gift planning donor and trends to watch out for as you look at your data base for prospects.
	Networking/Refreshment Break
	CHAPTER FIVE: The Donor Visit **Understanding the Successful Donor Visit** Learn how to prepare, arrange visits and have meaningful, successful conversations with donors about strategic charitable giving.
	Group work on visiting your Case Study family to talk about PS
	Debrief
6:00 p.m.	Dinner

	Thursday, October 29
7:00 – 8:30	Breakfast
Morning	**CHAPTER SEVEN: Charitable Bequests** **CHAPTER EIGHT: Gifts of Registered Funds** **Understanding Charitable Bequests – the #1 Deferred Gift** Overview of concepts, definitions, tax treatment and common legal terms related to bequests and estate administration. And, what you need to know to introduce and discuss these gifts with donors, sample bequest language, recognition, etc. **Gifts of Registered Funds** – Understanding this often overlooked method of deferred giving. Overview of tax treatment, concepts and donor discussion points.
	Group work on visiting your Case Study family to talk about Bequests and Registered Funds
	Networking/Refreshment Break
	Presentations to the larger group
Noon – 1:00	Lunch
Afternoon	**CHAPTER NINE: Gifts of Life Insurance &** **CHAPTER TEN: Charitable Gift Annuities** **Demystifying Gifts of Life Insurance** (and Annuities) Overview of concepts, definitions, tax treatment and processes involved in explaining and accepting various gifts of life insurance, (including their role in 'wealth replacement' and 'combined with annuities' gift plans). **CHAPTER ELEVEN: Gifts in Kind** Overview of opportunities, pitfalls, tax treatment and processes involved in explaining and accepting various gifts-in kind, (including when and how to decline gifts but save the relationship with the donor).
	Checking in on Bequests and Life Insurance – Assignment Questions and Answers
3:30 – 6:00	BREAK
6:00 – 7:00	Dinner
7:00 – 8:30	**Evening Session: Fireside Chat** This is your chance to submit questions, anonymously, on any topic or issue related to charitable giving. These will be presented by the faculty to the whole group for in-depth discussion. This is always an engaging, fun and very informative session.

Friday, October 30	
7:00 – 8:00	Breakfast
Morning	**Revisiting the Philanthropic Flow** Reviewing the steps along the donor-centred philanthropic journey.
	LEGACY MARKETING AND CORRESPONDENCE An overview of tips/techniques, review websites, samples, etc. on marketing legacy gifts.
	CHAPTER TWELVE: Expanding the Circle Presentation on the various tactics and strategies you can use to develop positive relationships with professional advisors. And, how to expand the conversation about a donor's philanthropic plan, with their permission, to include their professional advisors, family or friends.
	Networking/Refreshment Break
	CHAPTER THIRTEEN: Ethics in Gift Planning Discussion on the role ethics play in charitable giving and a chance to play, *The Ethical Dilemma Game*.
	Review Personal Learning Objectives & Develop Your Personal Action Plan
11:00 – 11:15	**Wrap up**
	Pick Up Boxed Lunch

Note: The agenda is subject to change.