



**Online Gift Planning Fundamentals for Professional Advisors –
Empowering Client Philanthropy**

AGENDA

**Wednesday, November 1 (Day 1)
and
Thursday, November 2 (Day 2)**

Wednesday, November 1, 2023

Day 1

Timing according to time zones

**8:00 a.m. – 12:00 p.m. PT
9:00 a.m. – 1:00 p.m. MT
10:00 a.m. – 2:00 p.m. CT
11:00 a.m. – 3:00 p.m. ET
12:00 p.m. – 4:00 p.m. AT**

**You are welcome to hang around after Day 1 is over;
We will keep the Zoom room open for half an hour for questions & discussion.**

Day 1

Pacific Time: 8:00 a.m. – 12:00 p.m.

8:00 – 9:00 a.m. | 10-min. break | 9:10 – 10:10 a.m. | 10-min. break | 10:20 – 11:05 a.m. | 25 min. break | 11:30 – 12:00 p.m.

Mountain Time: 9:00 a.m. – 1:00 p.m.

9:00 – 10:00 a.m. | 10-min. break | 10:10 – 11:10 a.m. | 10-min. break | 11:20 – 12:05 p.m. | 25 min. break | 12:30 – 1:00 p.m.

Central Time: 10:00 a.m. – 2:00 p.m.

10:00 – 11:00 a.m. | 10-min. break | 11:10 – 12:10 p.m. | 10-min. break | 12:20 – 1:05 p.m. | 25 min. break | 1:30 – 2:00 p.m.

Eastern Time: 11:00 a.m. – 3:00 p.m.

11:00 – 12:00 p.m. | 10-min. break | 12:10 – 1:10 p.m. | 10-min. break | 1:20 – 2:05 p.m. | 25 min. break | 2:30 – 3:00 p.m.

Atlantic Time: 12:00 p.m. – 4:00 p.m.

12:00 – 1:00 p.m. | 10-min. break | 1:10 – 2:10 p.m. | 10-min. break | 2:20 – 3:05 p.m. | 25 min. break | 3:30 – 4:00 p.m.

(Optional: stay for half an hour at the end for questions/discussion.)

Introduction

- Gift Planning Fundamentals: Overview of the Day
- Personal learning objectives
- Charitable and advisor landscape in Canada
- Having the Philanthropic Conversation with Clients
- What's in It for Clients?
- What's in It for You?

How: Preparing You

- Primer on donation taxation and charity principles
- Tax treatment of a cash gift and net cost of gift
- Trigger events and client prospecting
- Practicing having client conversations (group discussion)

What: The Gift Planning Vehicles – Part 1

- Publicly listed securities
- Flow-Through Shares
- Private Company Shares
- Charitable Bequests
- Practicing bequest conversation with clients (group discussion)



Online Gift Planning Fundamentals for Professional Advisors – Empowering Client Philanthropy

Thursday, November 2, 2023

Day 2

Timing according to time zones

8:00 a.m. – 12:00 p.m. PT

9:00 a.m. – 1:00 p.m. MT

10:00 a.m. – 2:00 p.m. CT

11:00 a.m. – 3:00 p.m. ET

12:00 p.m. – 4:00 p.m. AT

You are welcome to log in 15 minutes early for questions and discussion.

Day 2

Pacific Time: 8:00 a.m. – 12:00 p.m.

8:00 – 9:00 a.m. | 10-min. break | 9:10 – 10:10 a.m. | 10-min. break | 10:20 – 11:05 a.m. | 25 min. break | 11:30 – 12:00 p.m.

Mountain Time: 9:00 a.m. – 1:00 p.m.

9:00 – 10:00 a.m. | 10-min. break | 10:10 – 11:10 a.m. | 10-min. break | 11:20 – 12:05 p.m. | 25 min. break | 12:30 – 1:00 p.m.

Central Time: 10:00 a.m. – 2:00 p.m.

10:00 – 11:00 a.m. | 10-min. break | 11:10 – 12:10 p.m. | 10-min. break | 12:20 – 1:05 p.m. | 25 min. break | 1:30 – 2:00 p.m.

Eastern Time: 11:00 a.m. – 3:00 p.m.

11:00 – 12:00 p.m. | 10-min. break | 12:10 – 1:10 p.m. | 10-min. break | 1:20 – 2:05 p.m. | 25 min. break | 2:30 – 3:00 p.m.

Atlantic Time: 12:00 p.m. – 4:00 p.m.

12:00 – 1:00 p.m. | 10-min. break | 1:10 – 2:10 p.m. | 10-min. break | 2:20 – 3:05 p.m. | 25 min. break | 3:30 – 4:00 p.m.

What: The Gift Planning Vehicles – Part 2

- Gifts of Registered Funds
- Gifts of Life Insurance
- Charitable Gift Annuities
- Gifts in Kind

Where: Where can clients legally give?

- Charities, Foundations and Donor Advised Funds
- Crowdfunding, social-good projects and nonprofits

Case Study Work - Group**How: Empowering Philanthropy**

- Getting started
- Roadblocks and obstacles
- Working with charities
- Incorporating philanthropy in your practice
- Getting connected to the charity ecosystem in your region
- The MFA-P designation

Conclusion

- Final thoughts
- Personal Action Plan
- CAGP and your business