



Gift Planning Fundamentals

Agenda

Morning (8:00 a.m. – 12:15 p.m.)

- Introduction
 - Why GPF and what you'll learn
 - Charitable landscape in Canada
 - Strategic Gift Planning and donor-centred approach
 - Social Capital and Values-based planning
 - *Personal learning objectives*
- Key concepts
 - Primer on taxation and charity principles - glossary of terms
 - Tax treatment of a cash gift and net cost of gift
 - The donor conversation and learning a donor's story
 - Getting the visit
 - Discovery questions
 - Gift Acceptance Policy
- *Practicing the conversation with donors regarding their interests*

BREAK 10:00 – 10:30 a.m.

- Publicly listed securities
 - How PLS gifts work
 - Prospective donors for PLS
 - Marketing PLS
 - Administrative tips for PLS
- Charitable Bequests
 - How bequests work
 - Probate
 - Tax treatment of bequest gift
 - Talking about bequests
 - Bequest Administration
 - Marketing Bequests
 - Tracking and reporting on Bequests
- *Practicing the conversation with donors regarding gifts in a will*

Afternoon (1:15 p.m. – 5:00 p.m.)

- Gifts of Registered Funds
 - How they work
 - Prospective donors for gifts of Registered Funds
 - Tax treatment of gift of Registered Fund
 - Marketing and Administering Tips
- Gifts of Life Insurance
 - How they work
 - Advantages and disadvantages of LI gifts
 - Two common ways they work
 - Tax credits during lifetime
 - Tax credits for proceeds on death
 - Examples of tax treatment
 - Wealth replacement insurance
 - Marketing insurance gifts
 - Administrative considerations
- Charitable Gift Annuities
 - How they work
 - Reinsured Gift annuity examples
 - Example of annuity + insurance
 - Marketing Gift annuities
 - Administrative considerations
- Gifts in kind
 - How they work
 - Example of gift of principal residence
 - Target audience
- *Case study in groups – present to larger group after the break*

BREAK 3:00 – 3:30 p.m.

- Where to Donate
 - How a DAF works
 - Other funds
- Involving Others
 - Others in your shop
 - Working with Professional Advisors
 - Involving the donor's family
- *Personal Action Plan*