



CAGP Foundation Course Descriptions

As Canada's foremost educator in strategic charitable gift planning, the CAGP Foundation is committed to delivering the highest quality and most comprehensive education to fundraisers, professional advisors and senior decision makers who work with current and prospective donors to help them realize their philanthropic dreams. **See the highlights of our courses to help you decide which program is the right one for you.**

Gift Planning Fundamentals

Whether you are new to gift planning or you are in need of a solid refresher, Gift Planning Fundamentals is a **one-day introductory course** that covers the basics to get your feet wet. After taking this course you will have learned about:

- basic tax concepts about charitable gifts,
- the most common types of planned gifts in Canada (there is not sufficient time to cover all vehicles) and some operational and marketing considerations for each of the vehicles
- how to have a discovery conversation with donors.

This course will provide you with an overview to get you started on the right path, but does not provide the toolkit to start a gift planning program, nor the in depth comprehensive gift conversations. If you are already along that path you should consider one of the following two courses.

Gift Planning Fundamentals for Professional Advisors

Advisors who can effectively help clients engage in effective and fulfilling philanthropy while incorporating the benefits of giving into their financial and estate plan will have deeper client relationships and a competitive marketplace advantage. Attending the Gift Planning Fundamentals for Professional Advisors will give you:

- strategies to help you engage more deeply with existing clients and add value to them as a philanthropic advisor;
- tips to grow your book of business and connect with new clients through the philanthropic conversation;
- a better understanding of new trends in client philanthropy (e.g., advised funds, crowdfunding, social impact movements) as well as how to engage charity sector centres of influence.

This course is ideal for professionals who work in estate law, financial planning, insurance, financial investments, personal and corporate tax and family offices.

Strategic Gift Planning Bootcamp

Major Gift Professionals or Leadership Annual Gift Professionals with three to five years of experience know that a donor-centric approach to fundraising has you engaging with donors who are fully committed and have financial capacity, but perhaps they tell you the gift cannot be made today or in the near future. The **three-day** Strategic Gift Planning Bootcamp will equip you with:

- practical skills and knowledge regarding gift planning vehicles
- hands-on learning how to introduce gift planning and blended (current and future) gift options
- tools to identify who is a good prospect for a planned gift
- tips on working with donors and donor visits.

This course is designed for experienced fundraisers who want to be able to have more comprehensive gift conversations with donors and their advisors. The knowledge gained will allow you to maximize service to your donors while also optimizing current and future revenue for your organization.

For those who want to learn how to set up a program, establish gift acceptance policies, marketing and the technical aspects of gift planning please look into the CAGP Original Canadian Gift Planning course.

Original Canadian Gift Planning Course

The Original Canadian Gift Planning course is the longest-running and the most regarded course available on strategic philanthropy in Canada. Charity based fund-raisers or consultants with at least two years of fundraising experience and/or who oversee or are responsible for, gift planning will benefit from this comprehensive **five-day** course. There have been many professional advisors who have benefited from the course material and the in-depth experience of learning alongside their charity counterparts. The Original course provides in-depth education on the full range of strategic gift planning issues:

- the application of key gift planning vehicles (understanding the vehicle, its tax implications and donor profile)
- identify who are the best prospects for planned giving in your database
- hands on learnings how to introduce gift planning options
- tips working with donors and effective donor visits
- how to set up and manage a gift planning program
- proven strategies and tactics for marketing planned gifts to your donors and communities
- donor stewardship
- gift planner ethics.

This course provides an unrivaled educational experience, balancing formal classroom learning, in-depth discussions, group work, and case studies, while always incorporating adult-learning principles.

Advanced Canadian Gift Planning Summit

CAGP's Advanced Canadian Gift Planning Summit is an intensive immersion in the tax, legislative and philanthropic issues related to charitable giving. It builds on Canada's longest running and most authoritative course in charitable planning, the Original Canadian Gift Planning course.

This **two-day** summit is intended to provide a high level educational opportunity for CAGP Members and other professionals. It is designed for experienced gift planners, financial, trust and legal advisors who are looking for the next level of skill and knowledge in the philanthropic application of individual and corporate taxation, trusts, estates and financial planning strategies with high net worth donors / clients / philanthropists.

For more information about these courses visit www.cagp-acpdp.org or contact Erin Kuhns, Manager, Education and Training at ekuhns@cagp-acpdp.org.