Original Canadian Gift Planning Course

AGENDA

February 9-13, 2026

The Banff Centre, Banff, Alberta

Monday, February 9	
1:00 – 1:30	**Register in the classroom**
1:30 – 2:15	**Welcome & Orientation** Getting the Most out of the Original Canadian Gift Planning Course
2:15 – 3:00	**Chapter 1: What is Strategic Gift Planning?** Topics/Concepts include: • Shifting fundraising focus from only cash to accepting donations of assets • Transactional fundraising vs. Social Capital conversations • The current landscape of the charitable sector
3:00 – 3:30	**Break**
3:30 – 6:00	**Chapter 2: Tax Aspects and Gifts of Cash** Introduction to tax system in Canada and how charitable donations can reduce taxes payable, creating opportunities for clients/donors to plan their giving for maximum impact.
6:00 – 7:00	**Dinner**
7:00 – 8:00 p.m.	**Welcome Reception (Courtesy of CAGP)**

Tuesday, February 10	
7:00 – 8:30	**Breakfast**
8:30 – 8:45	**Chapter 2: Tax Aspects and Gifts of Cash** Quick review and pressing questions.
8:45 – 9:45	**Chapter 3: Gifts of Public Securities** Overview of the tax incentives when donating gifts of public securities, gift administration, and issuing receipts. Strategies for marketing and working with advisors and institutions.
9:45 – 10:00	**Break**
10:00-11:00	**Chapter 3: Gifts of Public Securities, continued**
11:00-11:45	**Group meets for Assignment #1 (Tax Aspects of Charitable Giving, Cash, Securities)**
11:45 – 12:00	**Group Photo (outside)**

12:00 – 1:00	**Lunch**
1:00 – 1:30	**Review of Assignment #1** (you will be provided with answers afterward)
1:30 – 3:00	**Chapter 4: Bequests** Benefits of charitable bequest for donors and charities. Explanation of what an Estate is, how they are administered, and how taxes are levied after death. Tax advantages of a charitable gift from a will, both cash and securities. Overview of marketing a bequest program.
3:00 – 3:15	**Break**
3:15 – 3:45	**Chapter 4: Gifts from registered funds (RRSPs, RRIFs & TFSAs)**
3:45 – 4:15	**Group meets for Assignment #2 (Bequests, RRIFs, RRSPs, & TFSAs)**
4:15 – 4:45	**Review of Assignment #2**
4:45 – 5:45	**Chapter 5: Marketing Your Gift Planning Program** Creating a marketing plan, including prospect identification encouraging hand-raisers, and reviewing various marketing tools available. **Please bring your own gift planning material to share with peers.*
5:45 – 6:30	**Dinner**
6:30	**Free Time / Optional Social Activity – Evening Johnson Canyon Ice Walk**

Wednesday, February 11	
7:00 – 8:30 a.m.	**Breakfast**
8:30 – 8:45	**Review of concepts: Gift of Securities, Bequests & Registered Funds, Marketing**
8:45 – 10:30	**Chapter 6: Gifts of Life Insurance** • Introduction to life insurance and how it can be used to make gifts to charities • CAGP's new national guidelines for charities, advisors and donors • The new landscape of charitable insurance products in Canada
10:30 – 10:45	**Break**
10:45 – 12:00	**Chapter 7: Endowments, Foundations, DAFs, and Working with Professional Advisors** Endowments and their uses, pros and cons; flexible options for creating endowments; endowment considerations; and encouraging endowment gifts. We will look at the different ways philanthropists use Foundations for their giving and explore the many types of Foundations, including Public, Private, Community, and Donor Advised.
12:00 to 12:30	Gifts of assets require collaboration with advisors, how should charities of all sizes work with this gift planning partner? We will address common ethical concerns and share CAGP research on "the philanthropic conversation", the business of philanthropy (including the emergence of online wills) and data from the Will Power We will also share insights on the MFA-P; Master Financial Advisor in Philanthropy.
12:30 – 1:15	**Lunch**
1:15 – 2:00	**Free Time**

2:00– 3:45	**Chapter 8: Cultivation, Solicitation & Closure** Principles and techniques of cultivation, relationship building and solicitation. How to get the visit, make it productive. Tips on the challenges that can derail a gift, and the things that need to be done closing the gift
3:45 – 4:00	**Break**
4:00 – 5:15	**Chapter 9: Recognition and Stewardship** The elements of recognition and stewardship, and reasons why they are essential, especially in gift planning. Ways to keep the stewardship program healthy and relevant over time.
5:15 - 6:00	**Group meets for Assignment #3 (Life insurance and Endowments)**
6:00 – 7:00	**Dinner**
7:00 – 8:30	**Fireside Chat** **Chapter 10: Ethical and Liability Issues** Examine the role that ethics plays in gift planning through ethically challenging gift-planning scenarios and the CAGP Code of Ethics. You will be encouraged to submit anonymous questions during the week. *This is a safe space.*

Thursday, February 12	
7:00 – 8:30	**Breakfast**
8:30 – 9:00	Review of Assignment #3
9:00 – 9:45	Role Play (in binder)
9:45 – 10:00	**Break**
10:00 – 11:00	**Groups work on Assignment #4 (Marketing)**
11:00 – 12:00	**Group presentations of Assignment #4**
12:00 – 1:00	**Lunch**
1:00 – 3:00	**Chapter 11: Managing a Gift Planning Program** Program design solutions for charities of all sizes, whether starting a program or reactivating a dormant one. Not one size fits all, we'll talk about what your organization and team needs, and capacity/budget to make it real. Tips on Bequest management, estate donation income tax receipting and program administration will be a special focus.
3:00 - 5:15	Groups convene to work on Assignment #5 (Culminating Case Studies)
5:20	**Meet in the lobby to walk to the off-site restaurant for dinner. Groups must leave by 5:25.**
5:45	**Off-site dinner at Balkan or Park Distillery in Banff**

Friday, February 13	
7:00 – 8:00	**Breakfast & check out** (Bring your luggage to the classroom or leave it with the front desk)
8:00 – 10:00	**Assignment #5: Culminating Case Study presentations**
10:00 – 11:00	**Parking Lot Topics, Closing Remarks and Completion Certificate Presentation**
11:00	**Boxed Lunches will be available**

**Note: The agenda is subject to change*