# Original Canadian Gift Planning Course

## QUESTIONS & ANSWERS

**How long has CAGP offered this course?**
As Canada's foremost educator in charitable gift planning, CAGP has been delivering this intensive course (once called "The Banff Course") for over 25 years. Originated by gift planning legends Frank Minton, Lorna Somers and Ken Ramsay, the course is the Canadian standard for best practices in seeking, securing and administering gifts to generations of charity executives, professional advisors, charity Board members, and fundraisers.

**What will be covered?**
In addition to a basic level of technical information on various current and deferred charitable giving options, the course explores the marketing of planned giving, starting, managing and administering a planned giving program, and building donor-centred, long-term relationships. Charitable gifts that will be covered include bequests, registered funds, life insurance and annuities, gifts-in-kind, and public securities.

This course will:

- equip participants with practical skills and knowledge regarding charitable gift options (and gift planning) from a donor-centred perspective;
- prepare participants to manage a gift planning program and to understand the unique responsibilities of a charity actively soliciting, accepting and receipting gifts beyond cash;
- provide opportunities to apply the learning through a variety of individual and group-based learning activities;
- engage participants in a network of like-minded peers confronting the same real-life challenges in their careers and organizations.

Sub-topics covered include: the ideal donor profile for each type of gift, timing issues, how to describe the impact of the gift, valuation and receipting requirements, marketing tips, recommended paperwork and policies, ethical quandaries, real-life case studies, potential pitfalls, and much more.

## What have past participants said?

*"A course well-presented and organized, time and money well invested!!! The material and content covered is relevant, informative, and applicable, and it is done in a way that facilitates the building of connections between the participants to further develop beneficial professional relationships."*
*Bold Kéré, Estate Advisor, Canadian National Christian Foundation (CNCF)*

*"The Original Canadian Gift-Planning Course is an extremely helpful experience for gift planners and other allied professionals. It is well-designed with excellent faculty and worthwhile material presented clearly."*

*"One of the best professional development courses I have ever attended."*
*Richard Lefebvre, The National Ballet of Canada*

*"This course was everything I hoped it would be and more. Not only have I come away with new knowledge and skills to help me both professionally and personally, I am more confident about being able to provide better assistance to our donors."*

*"Would highly recommend this course to anyone who is looking to introduce a PG program into their organization. The intense format is perfect for learning and the real life examples were a great help."*

*"You cannot get a more comprehensive, fundamental education in Canadian gift planning. I still refer to the original course material and its dog-eared notes. My classmates are an invaluable network of friends and colleagues." Doug Puffer (2002): Carleton, Queen's and Simon Fraser Universities*

## Why take this course?

- The competition for 'today's dollars' is intense. The competition for 'tomorrow's assets' is even more intense. Be able to offer your donors an alternative: a deeply meaningful way to pass on their values and assets for your organization's mission.
- Be ready to respond to donors who are becoming more sophisticated and savvy about charitable giving options.
- Be updated on changes to the regulatory and legal framework for charitable giving.
- More professional advisors are raising (or wish to raise) the topic of strategic philanthropy with their clients and may approach charities to learn more. Learn how to develop meaningful relationships with advisors.

## Who should attend?

This course is designed for:

- **fundraising professionals who are responsible for developing gifts from individuals (annual, major, and planned)**
- **Charity executives, Board members who want to understand the ethical, legal and administrative considerations of a gift planning program**
- **Professional advisors who believe in community, holistic client service, and best practices for their philanthropic constituents**

## How does this course compare to CAGP's Strategic Gift Planning Bootcamp?

**CAGP's Bootcamp** focuses primarily on the practical aspects of gifts and incorporating gift planning into conversations with prospects and donors. The **Original Course** delves deeper into the administrative, technical and management aspects of a gift planning program.
**Graduates of CAGP's Bootcamp** will find this course takes them to the next level: starting or managing a gift planning program with realistic benchmarks and expectations.

## What are the learning objectives?

**(In other words – if you attend this course, here's what you can expect.)**

- Expand and deepen your knowledge of giving options (for gifts now or later).
- Learn the importance and advantages of focusing on gifts of assets
- Be comfortable and confident in raising and discussing various gift options with donors, professional advisors or other charity colleagues and volunteers.
- Understand the unique obligations of a charity beneficiary and how to ensure excellent management and administration to maximize revenue and manage risk.
- Participate in a stimulating, challenging and informative learning experience
- Increase your network of fundraising professionals.
- Leave with a binder full of practical resources including templates, tools, tips along with a personal action plan.

**We purposely limit the number of participants in each course,** so faculty can deliver personalized service and to ensure everyone is able to participate in classroom discussions – to gain the greatest results. **So, don't be disappointed: register early!**

## Who will be teaching the course?

Original Course faculty members have taught many CAGP Gift Planning courses and have direct experience as professional advisors or planned giving professionals. In 2019 Course Faculty are **DeWayne Osborn** and **Jill Nelson**, with special guest **Paul Nazareth**. Please see their bios on our website.

## How much does the course cost?

Below are the registration costs for the September 2019 Original course in Saskatoon.

**Note: Tuition is tax exempt. Cost for Accommodation and meals includes all taxes, fees and gratuities.**

| CAGP Member | Early Bird Tuition (until July 22, 2019) | Meals | Accommodation | Total Estimated Cost |
|---|---|---|---|---|
| | $1,740.00 | $541.93 | $731.72 | $3013.65 |
| Non-Member | $2,040.00 | $541.93 | $731.72 | $333.65 |

**Total estimated cost** includes 4 nights' accommodation (Monday, Tuesday, Wednesday and Thursday), all meals beginning with Monday's dinner and ending with a boxed lunch on Friday, coffee breaks, course tuition, course materials and all applicable taxes, gratuities and fees. Tuition and meals will be paid to CAGP. Accommodation will be paid directly to the hotel by the participants at the end of the stay.

Original Course attendees may also take advantage of the group pricing of $160/night (plus taxes and fees for a total of $182.93/night) for accommodation for up to 3 days pre-and post-event.

**Regular tuition (July 23 – August 20, 2019)**

CAGP Member: $1,840

Non-member: $2,140

## Where will it be held?

This course is offered annually, alternating between eastern and western Canada. The next Original course will be held in Saskatoon, Saskatchewan.

## Will I receive CFRE credits for this course?

Yes, the course will offer up to **31.75** CFRE credits.

## How can I get more information or register?

Please visit our website.

Contact:
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