

2002 JOURNEYS IN CHARITABLE GIVING

This conference will provide valuable up-to-date information to professionals working with clients to achieve their philanthropic goals through estate and financial planning.

Don't miss this unique opportunity to share in the cumulative expertise from leaders in their fields. Each leader will highlight the key issues and CASE STUDIES in their field of expertise.

The conference is targeted to professional advisors including: accountants, lawyers, trust officers, financial planners, investment advisors, insurance advisors, wealth management consultants and planned giving officers. The Niagara Community Foundation presents this professional development event.

****Continuing education credits are available from CAIFA (2.5 credits) and CAFP (2.5 credits)****

REGISTRATION FEE - \$60.00 includes a resource binder of valuable information
Extra binders are available at workshop for \$30.00

Date: Wednesday, October 23, 2002
Time: 8:00 a.m. – 12:30 p.m.
Place: Four Points Sheraton
3530 Schmon Parkway, Thorold, ON

Contact: Liz Palmieri
Phone: (905) 684-8688
Fax: (905) 684-2337
Email: ncf@becon.org

- 8:00 – 8:30 Registration and Continental Breakfast
- 8:30 – 9:00 Opening Presentation – *What Motivates Donors to Give: What Makes a Philanthropist Tick*
Penelope Burk, Burk & Associates Ltd., Burlington
- 9:20 – 9:50 *Raising the Subject of Charitable Giving with Clients*
Ken Bridgman, C.A., Bridgman & Durksen; Anne Kemp, Wealth and Estate Planning Group, a division of London Life; Liz Palmieri, Niagara Community Foundation
OR
Tax Incentives for Gifts of Property
John Grummett, CA, Tax Partner, Grant Thornton LLP
- 10:00 – 10:30 *Charitable Gift Planning for the Entrepreneur/Small Business Owner*
John Loukidelis LLB, Senior Manager, Tax, KPMG LLP
OR
Whose Gift is it Anyway; Technical Interpretations Regarding Bequests
Suzanna Walters LLB, Director Trust Services South Western Ontario, BMO Harris Private Banking;
Carm D'Angelo LLB, Sullivan-Mahoney LLP
- 10:45 – 11:15 *Gifts of Life Insurance; Charitable Gift Annuities*
Dave Wilson BSc CLU, Regional Marketing Manager, National Accounts, Manulife Financial;
Thomas Seah, Insurance Consultant, RBC Dominion Securities
OR
Gifts of Securities/RRIFs/RRSPs
Jamie Golombek CA, CPA, CFP, TEP, Vice-President, Taxation & Estate Planning, AIM Funds Management Inc.
- 11:25 Closing Presentation – *A Donor, An Advisor, A Foundation and A Charity*
Hear first-hand from all parties involved in a donation benefiting a local charity. What motivated the donor to speak to the charity about a major gift and what did his advisor and the Niagara Community Foundation do to help with the process?

Registration form is on the next page
Thanks to our sponsors



The Standard



**REGISTRATION FORM
2002 JOURNEYS IN CHARITABLE GIVING**

Delegate Name – please print _____

Company/Organization _____

Mailing Address _____

Postal Code _____ Phone _____ Fax _____

E-mail: _____

NIIFA Membership #: _____ Are you a member of CAF? _____

Participants take part in the opening and closing presentations.
Please select the three other sessions from the list below that you will be attending (one in each time slot):

- 20:00 Raising the subject of charitable giving with your clients (*tips and tools on speaking to your clients about charitable giving*) **OR**
 Tax incentives for gifts of property (*the ins and outs of various tax benefits for gifts of property to charities*)
- 2:00 Charitable gift planning for the entrepreneur/small business owner (*some interesting gift planning examples useful for these clients*) **OR**
 Whose gift is it anyway?/Technical interpretations regarding bequests (*what to watch out for with bequests*)
- 3:45 Gifts of life insurance/Charitable gift annuities (*great case studies featuring gifts of insurance and charitable gift annuities*)
 Gifts of securities/RRIFs/RRSPs (*charities can now be beneficiaries of RRIFs and RRSPs; also learn more about special tax incentives with gifts of securities*)

LAST DATE TO REGISTER IS OCT. 8TH

Method of payment:

\$60 cheque enclosed: mail to Niagara Community Foundation,
17 Queen Street,
St. Catharines, ON L2R 5G5

\$60 charge on my credit card: MasterCard Visa

Credit Card Number: _____

Expiry Date: ____/____

Name on Credit Card: _____

Fax credit card orders to (905) 684-2337