Mindpath Conferences

Up to **6.0** CE Credits Available*

The Doing Well by Doing Good Conference

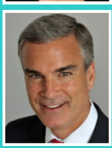
Growing Your Financial Advisory Practice Through Philanthropy

A Unique, One-Day Educational Conference for Senior Financial Advisors and Charitable Organizations
presented by Mind*path* and the Canadian Association of Gift Planners

Conference Chair
Diane MacDonald
Executive Director
Canadian Association of Gift Planners

Larry Amstutz
Planned Giving Officer
Canadian Cancer Society
B.C. & Yukon Division

Brenda McEachern
National Estate &
Tax Planning Consultant
Canada Life - BC Region



Keith Thomson
The Donor Motivation Program
Toronto, Ontario

Norma Cameron
The Narrative Company
Vancouver, BC

Richard Bell
Bell Alliance Legal Counsel
Vancouver, BC

Christopher Richardson
Charitable Gift Planning Consultant
& Philanthropy Advisor
Fund Development Advisor,
InnerChange Foundation

Nelson Simoes
WealthSense Financial Group Inc.

Heather MacLean
Tax Advisor
McLaren Trefanenko

Monday, April 23, 2012 ~ University Golf Club at UBC Campus ~ Vancouver, British Columbia

Massive Transfer of Wealth To Take Place In Canada

According to the Offord Group, a leading philanthropic consulting organization, Canadian baby-boomers can expect to inherit between $1 & $5 trillion in the next 30 – 40 years. Of this amount, the Offord Group estimates that as much as 60% will flow into the charitable sector.

Financial advisors can and are playing a pivotal role in facilitating their clients charitable donations creating a win-win situation for charities, clients and their practices.

Attend this unique, one-day Educational conference and learn how your practice can benefit from the coming tsunami of wealth transfer.

Charitable Donations Show Dramatic Increase

Between 1995 and 2008 Statistics Canada data show that charitable donations rose from $3.06 Bn to 8.02 Bn, a 150% increase.

Canadians Want To Leave a Legacy

Many Canadians are interested in leaving a legacy and making an impact with their bequests, not simply writing a cheque.

And Canadians are generous with their charitable donations. According to a 2010 global survey by UK based Charities Aid Foundation, Canadians rank third in the world when it comes to charitable giving.

Growing Your Financial Advisory Practice Through Philanthropy

This Mind*path* conference will give advisors a framework of knowledge to build their books by utilizing charitable giving as a financial and tax planning tool. The program features leading industry speakers who will share their insight and expertise in the field of philanthropic giving as a financial and tax planning facilitation vehicle. The program will cover tools, strategies and products designed to help advisors expand their books into a growing field as aging boomers who are increasingly thinking about the legacy they will leave behind.

Platinum Conference Partner

Canadian Cancer Society

Gold Conference Partner

Canada Life

Silver Conference Partner

The Donor Motivation Program
We Motivate Planned Giving!

Conference Partners

Canadian Association of Gift Planners
CAGP•ACPDP

Mackenzie Investments

Leave a Legacy

Advisor Discussion Panel

Hear first-hand from our end-of-day panel of financial advisors who have successfully integrated philanthropic giving strategies into their practices. Learn how advisors, clients and charities can effectively work together.

Mind*path* Conferences Are Highly Interactive & Educational

Delegates to Mind*path* conferences Appreciate the enhanced learning experience resulting from direct access to industry experts and generous Question and Answer sessions. In fact, delegates tell us they often get as much or even more out of Mind*path*'s hands-on Q&A sessions than they do out of the speaker's formal presentation. As well, Mind*path* speakers often commit to staying on-site for the entire day thereby enhancing your access to leaders in the industry.

Past Delegates Speak Highly of Their Experience at This Event

"This conference was easily one of the best that I have attended. I would definitely attend any future conferences that you hold (on this topic) and would recommend them to my colleagues. Truly a good job!!" **Diana Westwood, Investors Group**

"This was a fabulous conference. Very informative, good speakers, tangible stuff to leave with. It was refreshing. All too often I do not leave a training session / conference as pleased as I did with this one." **Sandra Stewart, Stewart Financial Services**

*CE Credits are Professional Development Credits from The Institute of Advanced Financial Education on behalf of Advocis. Most Mind*path* Conferences also qualify for IIROC CE Credits. Mind*path* is available to facilitate the IIROC CE Credit Approval process with attending advisors through their Professional Development and Training Departments.

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Tel. 416.929.MIND (6463) OR Toll-Free: 1.877.929.6463 Fax: 1.866.244.9837
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Past Conference Attendee Organizations

The following organizations have attended this conference in the past:

~ AEGON Dealer Services
~ Ajax Financial Planning
~ Archdiocese of Toronto
~ Assante Capital Management Inc.
~ Assante Financial Management Inc.
~ Benefaction Foundation
~ Benefits & Pension Monitor
~ Blacks Financial / Freedom 55 Financial
~ BMO Nesbitt Burns
~ Brady Financial Group
~ Braley Winton Financial Group
~ Burlington Community Foundation
~ Butler Wealth Mgmt. / ScotiaMcLeod
~ Canaccord Capital
~ Canada Gives
~ Canadian Association of Gift Planners
~ Canadian Cancer Society
~ Canadian Institute of Financial Planners
~ Canadian Medical Foundation
~ CIBC Private Wealth Management
~ CIBC Wood Gundy Financial Services
~ CIBC World Markets Inc.
~ Cidel Financial Group
~ Community Foundation of Mississauga
~ Credential Investments
~ Credential Securities Inc.
~ DeThomas Financial Corp.
~ Dow Jones Newswires
~ Dundee Private Investors / Dundee Securities / Dundee Wealth Mgmt.
~ Empowered Wealth
~ Etherington & Vukets
~ FaithLife Financial
~ Freedom 55 / Quadrus Investments
~ Freedom 55 Financial
~ From The Streets To Success
~ FundEx Investments Inc.
~ GMP Private Client
~ Gordon E. Pilkington Insurance
~ Hamilton Health Sciences Foundation
~ Hesselink & Associates Inc.
~ Investia Financial Services Inc.
~ Investment Planning Counsel
~ Investors Group Financial Services Inc.
~ IPC Investment Corp.
~ IPC Securities
~ Jewish Foundation of Greater Toronto
~ Joseph Brant Memorial Hospital Foundation
~ Knecht Financial Services
~ London Life
~ Mackenzie Investments
~ Manulife Securities Investment Services
~ McLean Budden
~ Meridian Credit Union
~ Miller Thomson LP
~ Nancy Brewer, Chartered Accountant
~ Nature Conservancy of Canada
~ Newport Partners
~ Niagara Community Foundation
~ Nova Star Insurance Consultant Inc.
~ Ontario Credit Union Charitable Foundation
~ PlanGiv Capital & PlanGiv Consulting
~ Rae & Lipskie
~ Raymond James
~ Robitaille & Calow Financial Inc.
~ Salvation Army
~ Simon Fraser University
~ Stable Financial Services
~ Stewart Financial Services
~ Stonegate Private Counsel LP
~ Strategic Philanthropy
~ Sun Life Financial
~ Tacita Capital
~ Talisman Investment Planning / FundEx
~ The Cooperators Gen'l. Ins. Co.
~ The Legato Group
~ Toronto Community Foundation
~ TTG Consult Inc.
~ United Way of Burlington & Greater Hamilton
~ United Way of Ste. Catharines & District
~ Wellington West Capital Inc.
~ Wesley Urban Ministries
~ Worldsource Financial Management Inc.
~ YMCA of Greater Toronto

PROGRAM AGENDA

8:45 AM Welcome / Introductory Comments from Mind*path* and introduction of Conference Chair

Diane MacDonald
Executive Director

Canadian Association of Gift Planners

9:00 – 9:45 AM Opening Keynote Speaker

Norma Cameron, CFRE
The Narrative Company

Topic: "Enhancing Client Relationships Through Philanthropy"

Including:

~ adopting a client-centric approach to philanthropy in your practice
~ developing partnerships with charitable organizations
~ solidifying and building your client base through philanthropy
~ the advisor as facilitator and 'point-person' in the charitable giving process

9:45 – 10:00 AM ~ Morning Refreshment & Networking Break

10:00 – 11:00 AM

Larry Amstutz, CHS
Planned Giving Officer
Canadian Cancer Society
B.C. & Yukon Division

Topic: "Charitable Giving ~ The Peter Principle"
Larry will deliver an educational, personal and enlightening presentation designed to inform professional advisors.

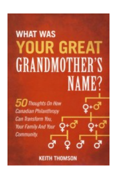
Including:

~ when do donors give? – a timeline
~ why donors give? – understanding the motivation behind charitable giving
~ how donors give – time and money; various instruments plus pro's and con's

11:00 – 11:30 AM

Keith Thomson, CFP, CIM, FCSI

Keith is a senior Financial Advisor in Toronto and author of the recently published book, 'What Was Your Great Grandmother's Name? ~ 50 Thoughts on How Canadian Philanthropy Can Transform You, Your Family and Your Community'



Topic: "Working With Clients and Charities to Protect and Expand Your Business "

Including:

~ How to initiate the topic of charitable giving in such a way that your clients will welcome the conversation.
~ Techniques to build a "competitive moat" around your business
~ Assisting your clients to actualize their charitable intentions and build AUM at the same time
~ Become an invaluable resource and consulting party to charities and their donors

11:30 – 12:00 Noon

Richard Bell

Topic: "Estate Planning and Philanthropy: The Legal Perspective"

Including:

~ different ways to make charitable donations
~ legal ramifications of each approach
~ coming changes in the new Wills, Estates and Succession Act

12:00 – 1:00 PM ~ Event Luncheon

1:00 – 1:45 PM

Brenda McEachern, B.Comm, LLB, TEP
National Estate & Tax Planning Consultant

Topic: "Integrating Insurance Solutions in Philanthropic Advice-Giving"

Including:

~ how insurance can benefit clients, charities and your book of business
~ the ins and outs of using insurance to maximize charitable donation impact
~ entry points for philanthropy in the business succession planning process
~ legacy philanthropy and insurance

1:45 – 2:30 PM

Christopher Richardson, FCA
Charitable Gift Planning Consultant
& Philanthropy Advisor
Fund Development Advisor

Topic: "Donor Advised Funds"

Including:

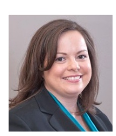
~ how donor advised funds facilitate charitable giving
~ where, when and how donor advised funds fit into your client's giving journey
~ a comparison of the various 'choices' available

2:30 – 2:45 PM ~ Afternoon Refreshment & Networking Break

2:45 – 3:45 PM ~ Advisor Discussion Panel

Moderator: Diane MacDonald

Nelson Simoes, BBA, CFP, FMA, CSWP



Heather MacLean, B.Comm, CGA

Topic: "Advisors, Clients and Charities"

Including:

~ how the three parties can work together effectively
~ hear how advisors have integrated philanthropy into their practices by involving both clients and charities

3:45 – 4:00 PM ~ Summary, Wrap-Up & Business Card Draw

4:00 – 5:00 PM ~ Networking Reception

CONFERENCE LOCATION

University Golf Club
at UBC Campus
5185 University Blvd.
Vancouver, B.C. V6T 1X5

Tel.: (604) 224-7799

Registration Form

Conference Fee:

$199.00 Per Delegate + HST = **$224.87** <u>or</u> $149.00 Per Delegate + HST = **$168.37** with Sponsor discount

- ☐ The Canadian Cancer Society #CCS1201
- ☐ The Canadian Association of Gift Planners #CAGP1202
- ☐ The Donor Motivation Program #DMP1203
- ☐ Canada Life Assurance Company #CLA1204

Two or more advisors registering from the same branch receive a 10% discount on the above rates.

Yes I would like to register the following people from my firm:

________________________________ ___________________
Delegate Name (please print name in full) Title

________________________________ ___________________
Delegate Name (please print name in full) Title

________________________________ ___________________
Delegate Name (please print name in full) Title

________________________________ ___________________
Delegate Name (please print name in full) Title

________________________________ ___________________
Delegate Name (please print name in full) Title

Total number of delegates:

______ x $199.00 = _________ + HST = _________

______ x $149.00 = _________ + HST = _________

____
Company Name

____
Address

____
City Province Postal Code

____
Phone eMail Address(es) (All delegate confirmations will be sent out via eMail)

Method of Payment

☐ Cheque ☐ VISA ☐ M/C ☐ AMEX

Card Holder's Name: ______________________
Card Number: ______________________
Expiry Date: ______________________
Signature: ______________________
Today's Date: ______________________

How to Register

You may register in one of the following ways:

1. **Register Online**
   Register online by clicking **here**
2. **Register by Fax**
   By faxing the completed registration form toll-free to 1.866.244.9837
3. **Register by Mail**
   Send completed registration form along with cheque payable to Mind*path* corp. to the following address:
   60 St. Clair Ave. East, Suite 205
   Toronto, ON M4T 1N5
4. **Register by Phone**
   Call 416.929-MIND (6463), Toll Free 1.877.929.6463

Note:
~ Continental Breakfast opens at 7:30 AM
~ Conference commences at 8:45 AM
~ Business Card Draw & Networking Cocktail Reception follow conference sessions at 4:00 PM