Mindpath Conferences

Up to 6.0 CE Credits Available*

The 5th Annual 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

Patrick Johnston
Principal
Borealis Advisors

Jessica John
Development Officer, Planned Giving
Canadian Cancer Society

Steven McLeod
National Estate and Tax Planning Consultant
Canada Life

Brad Offman
Vice President
Strategic Philanthropy
Mackenzie Investments

Ryan Fraser
Director of Business Development
Freedom 55 Financial

Colleen DeJaeger
Director, Planned & Memorial Giving
London Health Sciences Foundation

Advisor Discussion Panel

Sheila Norman
Portfolio Manager
CGOV Asset Management

William Vastis
Vice President, & Director
Portfolio Manager
RBC Wealth Management
Dominion Securities

Susan Latremoille
Director, Wealth Management / Wealth Advisor
Richardson GMP

Thursday, June 14, 2012 ~ Mississauga Convention Centre ~ Mississauga, Ontario

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

Conference Partners

Canadian Association of Gift Planners
CAGP•ACPDP

LEAVE A LEGACY

Mackenzie INVESTMENTS

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.

Delegates at the Recent Vancouver Doing Well by Doing Good Conference Spoke Highly of Their Experience

"Thanks for organizing a great conference." **Ben Kendall**, Investment Advisor, CIBC Wood Gundy, New Westminster, BC

"Great opportunity to come together and learn more about incorporating charitable giving into my practice." **Connor Brodie**, Financial Planning Consultant, Investors Group, Surrey, BC

"Thanks for putting on such a great conference last week. It was excellent." **Kirsty Hannah**, Investment Advisor Associate, Victoria, B.C.

"Great conference - a good roster of engaging speakers presenting on a cross-section of relevant topics." **Gregory Brown**, Desjardins Financial Security, Surrey, BC

*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.

Mind*path* corp., 60 St. Clair Ave. East, Suite 205, Toronto, Ontario, Canada M4T 1N5
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 remarks from Mind*path* and introduction of Conference Chair

Conference Chair
Diane MacDonald
Executive Director

Canadian Association of Gift Planners

9:00 – 9:45 AM

Patrick Johnston
Principal

Topic: "Philanthropy 2.0 – emerging trends that will shape the future of giving in Canada"

Including:
~ the growth of impact investing and the implications for financial advisors
~ social finance and the blurring of non-profit / for-profit boundaries
~ the increasing demand for outcome measures
~ changing demographics and the impact of multiculturalism

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

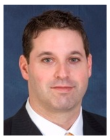
10:00 – 11:00 AM

Jessica John
Development Officer, Planned Giving

Topic: "Talking Philanthropy With Your Clients - Why and How"

Including:
~ initiating the philanthropic conversation with your clients: where, when, how
~ formulating charitable mission and goals
~ differentiating your message in the advice-giving process?
~ the importance of specificity

11:00 – 11:45 AM



Brad Offman
Vice President, Strategic Philanthropy

Topic: "Donor Advised Funds"

Including:
~ why donor advised funds?
~ how donor advised funds facilitate charitable giving
~ where and how donor advised funds fit into a client's portfolio

12:00 – 1:00 PM ~ Event Luncheon

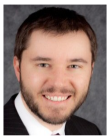
1:00 – 1:45 PM

Steven McLeod
National Estate and Tax Planning Consultant

Topic: "Planned Giving with Life Insurance"

Including:
~ integrating life insurance solutions in philanthropy
~ overview of the top life insurance strategies used for charitable giving
~ highlight particular opportunities available for business owners
~ discuss current tax environment affecting the donation of life insurance policies

1:45 – 2:30 PM



Ryan Fraser
Director of Business Development

Colleen DeJaeger
Director, Planned & Memorial Giving

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

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

Moderator: Diane MacDonald

Sheila Norman
Portfolio Manager

William Vastis
Vice President, & Director Portfolio Manager

Susan Latremoille
Director, Wealth Management / Wealth Advisor

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

Diane MacDonald addresses the Vancouver Doing Well by Doing Good Conference April 23, 2012

Mind*path* corp., 60 St. Clair Ave. East, Suite 205, Toronto, Ontario, Canada M4T 1N5
Tel. 416.929.MIND (6463) OR Toll-Free: 1.877.929.6463 Fax: 1.866.244.9837
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CONFERENCE LOCATION

Mississauga Convention Centre
75 Derry Road West
Mississauga, ON L5W 1G3

Tel. 905.564.1920
Toll-Free 1.877.766.4613

Registration Form

Conference Fee:

$199.00 Per Delegate + HST = **$224.87** or $149.00 Per Delegate + HST = **$168.37** with Sponsor discount

- ☐ The Canadian Cancer Society #CCS1201
- ☐ The Canadian Association of Gift Planners #CAGP1202
- ☐ Canada Life #CLAC1203
- ☐ Mackenzie Investments #MI1204

Group discount: 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