Mind*path* Conferences

Up to 6.0 CFP CE Credits Available From FPSC*

The Hamilton Doing Well by Doing Good Conference

Growing Your Financial & Professional Advisory Practice Through Philanthropy

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

Conference Chair
Terry Cooke
President & CEO
Hamilton Community Foundation

Jessica John
Manager, Planned Giving
Canadian Cancer Society

Denise Fernandes
Associate Director, Gift & Estate Planning
SickKids Foundation

Ron Foxcroft
Chairman, President & CEO
Fluke Transport

Tom Deans Ph.D.
President
Détente Financial Press
Author: Willing Wisdom

Bruce Cumming
Executive Director, Private Client Group
& Senior Investment Advisor
HollisWealth

Paul Moore, CPA, CMA, BA
Senior Financial Advisor, Vice President
Assante Capital Management Ltd.

Thursday, May 29, 2014 ~ Royal Botanical Gardens ~ Dalglish Atrium, Burlington, Ontario

Advisors Well Positioned to Facilitate the Philanthropic and Charitable Giving Process

Professional advisors are playing a pivotal role in facilitating their clients philanthropic and legacy objectives thereby creating a win-win scenario 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.

Massive Wealth Transfer Set To Take Place in the Coming Years

It is estimated that Canadian baby-boomers can expect to inherit between $1 & $5 trillion in the next 30 – 40 years. Of this amount, projections are that well over 50% will flow into the charitable sector.

Professional advisors can and should play a role in this process. Learn how at this conference.

Growing Your Professional Advisory Practice Through Philanthropy

This Mind*path* conference will give professional advisors a framework of knowledge to build their practices by utilizing charitable giving as a financial and tax planning tool.

***Important Note re CE Credits:** Financial Advisors will qualify for up to 6 CE Credits from the Financial Planning Standards Council (FPSC). This conference may also qualify for IIROC CE Credits. Mind*path* is available to help facilitate the IIROC CE Credit approval process with attending advisors through their professional development departments.

Platinum Conference Partner

Canadian Cancer Society

Silver Conference Partners

SickKids Foundation

McMaster University

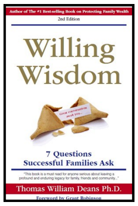
Conference Partner

CAGP • ACPDP

Leave a Legacy

Canadian Association of Gift Planners

Willing Wisdom



All delegates will receive a complimentary copy of Dr. Deans' thought-provoking book on last wills and testaments, Willing Wisdom.

Leading-Edge Content, Top Speakers

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.

Learn how advisors, clients and charities can effectively work together.

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

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

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

Mind*path* corp., 1601 Bayview Avenue, Suite 43583, Toronto, Ontario, Canada M4G 4G8
Tel. 416.929.MIND (6463) OR Toll-Free: 1.877.929.6463 Fax: 1.866.244.9837
www.Mind*path*.ca

Representatives from 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.
~ Desjardins Financial Security
~ 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 – 9:00 AM ~ Welcome Remarks and Introduction of Conference Chair

Conference Chair
Terry Cooke
President & CEO
HAMILTON COMMUNITY FOUNDATION

9:00 – 9:45 AM ~ Opening Keynote Address
Topic: "The Charitable Giving Landscape ~ An Overview of Giving, Philanthropy & Wealth Transfer in Canada"

Including:
~ the charitable giving landscape in Canada
~ the coming wealth transfer tsunami
~ the increasing sophistication of donors

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

10:00 – 10:45 AM

Jessica John
Manager, Planned Giving
Canadian Cancer Society

Topic: "Donor Personalities ~ Identifying the Seven Most Common Personality Types"

Including:
~ when, why and how to identify the seven donor personality types
~ using this information to unlock donor motivations and goals
~ leveraging donor personality traits into stronger client relationships
~ tailoring charitable giving strategies to donor personality types

10:45 – 11:15 AM

Denise Fernandes
Associate Director, Gift & Estate Planning
SickKids FOUNDATION

Topic: 'The Charitable Gift: Advisors & Charities Working Together'

Including:
~ how charities can provide value in your practice
~ how advisors can facilitate and benefit in the charitable giving process
~ real-life, case study examples of effective advisor / charity relationships

11:15 – 12:00 Noon

Ron Foxcroft
Chairman, President & CEO
FLUKE TRANSPORTATION Group

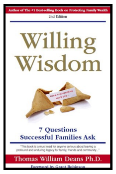
Topic: 'The Importance of Giving Back to Your Community'

Including:
~ community involvement as a catalyst for personal and business growth
~ how to get involved
~ the rewards of doing good works in your community

12:00 – 1:00 PM ~ Event Luncheon

1:00 – 2:00 PM

Tom Deans Ph.D.
President
Détente Financial Press
Author: Willing Wisdom



Topic: 'Willing Wisdom'

Including:
~ North Americans will inherit $20 Trillion over the next 20 years
~ 125 Million do not have a legal will
~ how professional advisors can be part of the solution

2:00 – 2:15 PM ~ Afternoon Refreshment & Networking Break

2:15 – 3:15 PM

Bruce Cumming
Executive Director, Private Client Group & Senior Investment Advisor
HollisWealth

Topic: 'Transforming Your Clients from Donors to Philanthropists'

Including:
~ integrating life insurance and annuity solutions into the philanthropic giving process
~ overview of the top life insurance strategies used for charitable giving
~ legacy planning for philanthropy not CRA

3:15 – 4:00 PM ~ Advisor Discussion Panel

Paul Moore, CPA, CMA, BA
Senior Financial Advisor, Vice President
Assante WEALTH MANAGEMENT

Topic: "Advisors Successfully Integrating Philanthropy Into Their Practices"

Including:
~ the different approaches advisors use to integrate philanthropic advice giving into their practices
~ leveraging community involvement and good works into new client relationships
~ board directorships and networking your way to new business opportunities

4:00 – 5:00 PM ~ Networking Reception

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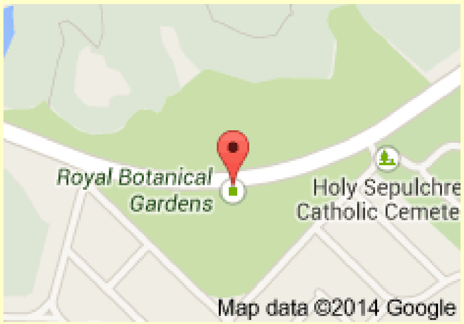
CONFERENCE LOCATION

ROYAL BOTANICAL GARDENS

Royal Botanical Gardens
(Dalglish Atrium)
680 Plains Road
Burlington, ON L7T 1J1
Tel. 905.526.1158



Registration Form

✂ -

Conference Fee:

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

- ☐ No Sponsor Discount Required
- ☐ Canadian Cancer Society
- ☐ SickKids Foundation
- ☐ Canadian Association of Gift Planners

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 $149.00 = _________ + HST = _________

______ x $199.00 = _________ + HST = _________

____
Company Name

____
Address

____
City Province Postal Code

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:
   1601 Bayview Avenue, Suite 43583
   Toronto, ON M4G 4G8
4. **Register by Phone**
   Call 416.929-MIND (6463), Toll Free 1.877.929.6463

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

Note:
~ Continental Breakfast opens at 7:30 AM
~ Conference commences at 8:45 AM
~ Business Card Draw & Networking Cocktail Reception follow conference takes place between 4:00 PM and 5:00 PM