Mind*path* Conferences

Up to 6.0 CE Credits Available*

The 8th Annual 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
Brad Offman
Founder & Principal
Spire Philanthropy

Nicole Nakoneshny
Vice President, Strategy & Assessments
Editor, Philanthropic Trends Quarterly
Ketchum Philanthropy

Tony Lee
Director of Leadership Philanthropy
Canadian Cancer Society

Tina Tehranchian
Planned Giving Consultant
The Donor Motivation Program

Laura Mullin
Planned Giving Coordinator
Canadian Cancer Society

Thursday, November 12, 2015 ~ Mississauga Convention Centre

Advisors Leading the Philanthropic Charge

Over the past seven years of this conference, it has become clear that advisors can play a key role as 'point person' when it come to their clients philanthropic and legacy planning.

By initiating a conversation about philanthropy and charitable giving, advisors can solidify relationships with clients plus establish new relationships with their offspring, charities and other beneficiaries ….. not to mention create new practice-building, rather than asset-losing, opportunities.

According to a research study conducted by the Canadian Association of Gift Planners in 2014, high net worth individuals are favourably disposed to discussing the topic of philanthropy and much earlier in the advisor/client relationship than advisors realize.

Other findings from this study include:

- almost all High Net Worth Individuals (HNWI) are donating to charity; these people are open to discussions around taking their giving to a higher level

- HNWI are motivated by a desire to make an impact in their community, give back and follow their passion for a cause

- reducing the impact of taxes is not a driving force for most HNWI but a side benefit

- HNWI are interested in talking about their giving values in addition to technical issues

… hear detailed results from this study during the day

Generational Wealth Transfer

It is estimated that baby-boomers will benefit from a windfall of between $1 & $5 trillion in the next 30 – 40 years. A significant portion of these funds will flow into the charitable sector.

Professional advisors can and should play a role in this process. Learn how at this industry-leading conference on philanthropy and charitable giving for advisors.

Platinum Conference Partner

Canadian Cancer Society

Conference Partners

CAGP

Canadian Association of Gift Planners

Industry-Leading Speakers and Practical Content

This conference features leading industry speakers who will share their insight and expertise in the field of philanthropic giving as a legacy planning vehicle in additional to a financial and tax planning opportunity.

The program will cover tools, strategies and products designed to help advisors expand their books into the growing field of charitable giving and legacy planning.

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

CE Credits from the Financial Planning Standards Council and The Institute

FPSC FINANCIAL PLANNING STANDARDS COUNCIL

The Institute for Advanced Financial Education

Important Note re CE Credits: Financial Advisors will qualify for up to 6 CE Credits from the **Financial Planning Standards Council** (FPSC) and from Advocis & **The Institute for Advanced Financial Planning** (The Institute). 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.

Advisor Discussion Panel

Hear first-hand from our end-of-day panel of financial & professional advisors who have successfully integrated philanthropic giving strategies into their practices.

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 & 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 speakers' 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.

Here is What Delegates to Last Year's Conference Had to Say

"Thank you very much for a great conference. The topic was timely and all of the speakers were excellent." **Gary Woodward**, Assante Capital Management Ltd.

"I was thoroughly impressed with last week's advisor philanthropy conference. The program contained actionable ideas on how to help my clients integrate philanthropy into their financial plans. Mind*path* & CAGP put together a talented group of experts that made the day a valuable use of my time. Thank you." **David Hogg**, CFA, FSCI, Vice President & Associate Portfolio Manager, BMO Nesbitt Burns

"I wanted to congratulate you on one of the best conferences I have ever been to." **Pat Dunwoody**, Board Chair, Community Living Dufferin

"My thanks to you for a fantastic DWDG conference – congratulations ! Speaking on behalf of SickKids Foundation and CAGP, we were delighted to be a part of the day." **Malcom Berry**, Vice President, Major Gifts, SickKids Foundation and Chair, National Board of Directors, Canadian Association of Gift Planners (CAGP)

Representatives from the following organizations have attended this conference in the past

~ AEGON Dealer Services
~ Ajax Financial Planning
~ Assante Capital Management Inc.
~ Assante Financial Management Inc.
~ Benefaction Foundation
~ Benefits & Pension Monitor
~ Bequest Insurance
~ 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
~ PriceWaterhouse Coopers
~ Rae & Lipskie
~ Raymond James
~ RBC Dominion Securities / Wealth Management
~ 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
~ TD Waterhouse
~ 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 Brad Offman

CONFERENCE CHAIR
Brad Offman
Founder & Principal

9:00 - 9:45 AM

Nicole Nakoneshny
Vice President, Strategy & Assessments
Editor, Philanthropic Trends Quarterly

Topic: "An Overview of the Philanthropic and Charitable Giving Landscape in Canada"

Including:
~ Canadian charitable donation levels, historic and current
~ changing attitudes and trends among Canadian donors
~ the take-away for advisors and charities

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

10:00 - 11:00 AM

Tony Lee
Director of Leadership Philanthropy

Tina Tehranchian
Planned Giving Consultant

Topic: "Broaching the Topic of Philanthropy with Clients"

Including:
~ a "fireside chat" with advisors on when, where, why and how they broach the topic of philanthropy with their clients

11:00 - 11:30 AM ~ Keynote Speaker

Topic: "Legacy Planning and Your Clients"

Including:

~ how to gain instead of lose assets in the philanthropic planning process
~ successful approaches which work for your practice
~ do's and don'ts

11:30 AM - 12 Noon

Topic: "The Importance of Philanthropy and How My Donation Made a Difference"

12:00 - 1:00 PM ~ Event Luncheon

1:00 - 1:45 AM

Laura Mullin
Planned Giving Coordinator

Topic: "Advisors, Philanthropy and Conversations With Clients" - Results from a recent CAGP Research Study

Including:
~ the giving behaviour, motivations & hesitations of High Net Worth Individuals
~ client philanthropic knowledge levels
~ benefits of conducting philanthropic conversations with clients

1:45 – 2:30 PM

Topic: "Leveraging Insurance to Fund Philanthropy"

Including:

~ life insurance solutions and philanthropic giving
~ overview of insurance strategies used in legacy planning and charitable giving
~ tax saving opportunities through insurance

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

2:45 - 3:30 PM

Topic: "Donor Advised Funds – A Philanthropic Investment Vehicle"

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

3:30 - 4:30 PM ~ Advisor Discussion Panel

Hear first-hand from advisors who are integrating Philanthropy & Charitable Giving into their practices

Including:

~ how & why advisors got into the philanthropic giving space
~ what vehicles do advisors use to engage clients in the giving and legacy planning process
~ walking the talk; how giving back opens doors

4:30 PM ~ Summary, Wrap-Up & Business Card Draw

4:40 - 5:30 PM ~ Networking Reception

Mind*path* corp., 1601 Bayview Avenue, Suite 43583, Toronto, Ontario, Canada M4G 4G8
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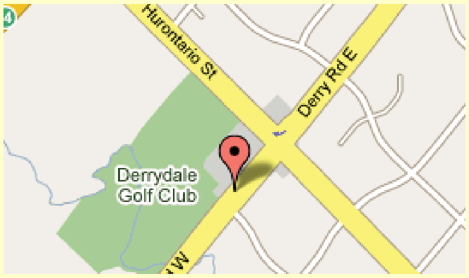
CONFERENCE LOCATION

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

Tel. 905.564.1920
Toll-Free 1.877.766.4613



Registration Form

Conference Fees

Early Bird Special ! - Register by November 1 and Save

Register By November 1
1. $149. per delegate + HST = $168.37   **2.** With sponsor discount: $99. + HST = $111.87

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

After November 1
1. $199. per delegate + HST = $224.87   **2.** With sponsor discount: $149. + HST = $168.37

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

Group Discount: Two or more delegates from the same office 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)   Job Title

___________________________________   ____________________
Delegate Name (please print name in full)   Job Title

___________________________________   ____________________
Delegate Name (please print name in full)   Job Title

___________________________________   ____________________
Delegate Name (please print name in full)   Job Title

___________________________________   ____________________
Delegate Name (please print name in full)   Job Title

Total number of delegates:

______ x $99.00 = _________ + HST = _________

______ 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

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Phone   Email Address(es)   ***Note:** 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 4:40 PM and 5:30 PM