Mindpath Conferences

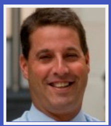
Up to 6.0 CE Credits Available*

The 7th 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
Ruth MacKenzie
Executive Director
Canadian Association of Gift Planners



Brad Offman
Founder & Principal
Spire Philanthropy

Tony Lee
Director of Leadership Philanthropy
Canadian Cancer Society

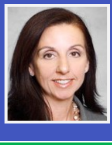
Jo-Anne Ryan
Vice President, Philanthropic Advisory Service
TD Waterhouse

Joe Canavan
Executive Chairman
Wealthsimple

Paul Nazareth
Vice President
Community Engagement
Canada Helps

Akua Carmichael, LLB, LD
Wealth Planning Lawyer

Sandra Dow
Senior Director
Philantropic Giving
The Arthritis Society



Evasia Patrianakos
Investment Advisor & Wealth Advisor, Financial Planner
RBC Dominion Securities

Amanda Stacey
Partner
Miller Thomson

Brenda Lee-Kennedy
Partner, Tax Consulting
PriceWaterhouse Coopers

Thursday, November 20, 2014 ~ Toronto Board of Trade Downtown

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.

According to a recent study by the Philanthropic Institute, advisors often underestimate their clients desire to discuss their philanthropic and charitable objectives and overestimate clients interest in employing tax savings strategies as part of the charitable giving process. Learn how to address these issues during this one day conference.

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 more than 50% 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.

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 philanthropy, charitable giving and legacy planning as a conversation starter.

Leading-Edge Content, Top Speakers

The day will feature 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.

Platinum Conference Partner

Canadian Cancer Society

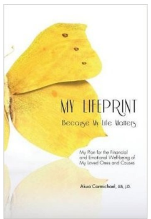
Conference Partners

SickKids Foundation

CAGP•ACPDP

Leave a Legacy

Canadian Association of Gift Planners



All delegates will receive a complimentary copy of keynote speaker Akua Carmichael's financial guide: 'My Lifeprint'.

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.

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 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.

Here is What Delegates to The 2014 Hamilton Conference on This Topic Had to Say

"Congratulations on a wonderful event yesterday. I very much enjoyed the depth and breadth of speakers." **Tim Herron**, Vice President, Terra Fund Management Limited

"Thank you so much for the conference on Thursday. My goal as I attend workshops and conferences is that i will leave with one nugget of value to aid in my career. As I assessed the day on Thursday, I was able to walk away at least three real tangible nuggets of value. Connecting with colleagues and enjoying the setting was very enjoyable." **Steve Weir**, Senior Associate, Link Charity

"I found this conference to be excellent. The pace and variety of the speakers, the level of useful content and their overall competence at public speaking was refreshing. I also appreciated the balance for those working as fundraisers and those who are advisors." **Sandra Baker**, Philanthropy Consultant

"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

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.mindpath.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
~ YMCA of Greater Toronto

PROGRAM AGENDA

8:45 AM Welcome remarks from Mind*path* and introduction of Ruth MacKenzie

CONFERENCE CHAIR
Ruth MacKenzie
Executive Director

9:00 - 9:45 AM

Brad Offman
Founder & Principal

Topic: "The Future of Philanthropy in Canada"
Including:
~ Advisors and their role in shaping philanthropy
~ The new regulatory environment and how this will shape giving
~ The new revenue model for charities

9:45 - 10:30 AM

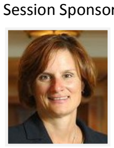
Tony Lee
Director of Leadership Philanthropy

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

10:30 - 10:45 AM ~ Morning Refreshment & Networking Break

10:45 - 11:15 AM

Session Sponsor:



Jo-Anne Ryan
Vice President,
Philanthropic Advisory Service

Topic: "Time, Treasure and Talent: Canadian Women & Philanthropy"
Including:
~ an overview of this comprehensive research study
~ why and how women have a unique way of donating
~ how advisors can develop strategies to better meet female donor needs
~ Canadian women control approximately $3.2 Trillion in assets
~ delegates will hear how to tap into this market with real-life examples

11:15 AM - 12 Noon

Joe Canavan
Executive Chairman

Topic: "Making a Difference in Our Community"

12:00 - 1:00 PM ~ Event Luncheon
Featuring the fine food of Oliver & Bonacini Restaurants

1:00 - 1:45 PM

Paul Nazareth
Vice President
Community Engagement

Topic: "Serving your Client's Philanthropic Needs"
Including:
~ How to have conversations about giving
~ Strategies on making annual gifts both tax-smart and heart-advised
~ Using social media to listen for client philanthropy
~ Philanthropic motivations at each age and stage of life

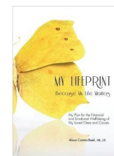
1:45 - 2:15 PM

Topic: "Insurance Solutions and Planned Giving"
Including:
~ leveraging life insurance for optimal philanthropic and charitable giving benefit for donors
~ overview of the top life insurance strategies used for charitable giving
~ the current tax environment with respect to donation of life insurance policies

2:15 - 2:30 PM ~ Afternoon Refreshment & Networking Break

2:30 - 3:15 PM

Akua Carmichael, LLB, LD
Wealth Planning Lawyer



Topic: "Leaving a Legacy ~ What is Your Lifeprint?"
Including:
~ Use of a non-traditional approach to estate and legacy planning
~ How advisors can use estate and legacy planning as a business development tool to grow their businesses
~ What is a lifeprint? How estate planning and legacy intersect to form one's lifeprint
~ How advisors can help clients through their personal journey of estate planning

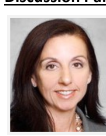
3:15 - 4:00 PM ~ Advisor Discussion Panel

Topic: "Advisors & Philanthropy"
~ learn how these advisors are integrating Philanthropy into their financial and professional advisory practices

Panel Moderator

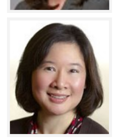
Sandra Dow
Senior Director,
Philantropic Giving

Discussion Panelists



Evasia Patrianakos, CFP, CIM
Investment Advisor & Wealth Advisor,
Financial Planner

Amanda Stacey, B.Comm, JD
Partner



Brenda Lee-Kennedy, CA, TEP
Partner,
Tax Consulting

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

4:10 - 5:00 PM ~ Networking Reception

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CONFERENCE LOCATION

Downtown Centre
Board of Trade
4th Floor Ballroom
First Canadian Place
Toronto, ON M5X 1C1
Phone: 416.366.6811 | Fax: 416.366.2444
(Parking is available at First Canadian Place. Enter off Adelaide or York Streets.)
1 First Canadian Place (map)

Registration Form

Conference Participation

Please choose one of the following two options:

1. I will attend the Conference ☐
2. I will participate in the Live Webcast ☐

Conference Fees

Early Bird Special! Register by November 1 and Save

Attend the Conference or NEW! Participate in the Live Webcast of the day's proceedings.

Register By November 1
$149.00 Per Delegate or Online Participant + HST = **$168.37** or $99.00 Per Delegate or Online Participant + HST = **$111.87** with Sponsor discount

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

After November 1
$199.00 Per Delegate or Online Participant + HST = **$224.87** or $149.00 Per Delegate or Online Participant + HST = **$168.37** with Sponsor discount

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

Note for Webcast Participants: Registration confirmation will include your Password and Link to the Online Conference.

Group Discount: Two or more delegates from the same office receive a 10% discount on the above rates. For Online Participant Group rates, contact Mind*path*.

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

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

____
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 4:00 PM and 5:00 PM