Mindpath
Creating New Paths To Learning

Up to
6.0
CE Credits
Available!*

3rd 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

Conference Chair
Brad Offman
Vice President, Strategic Philanthropy
Mackenzie InvestmentS

Mike Skrypnek
Director, Wealth Management
Richardson GMP Limited
Author: 'Philanthropy ~ An Inspired Process'

Cheryl Hudson
Managing Partner
Dove Management Inc.

Tony Lee
Director, Gift Planning
Canadian Cancer Society

Ken Gordon
President & Founder
Equigenesis

Keith Thomson
Managing Director
Stonegate Private Counsel

Jo-Anne Ryan
Vice President
Philanthropic Advisory Services
TD Waterhouse

Joshua E. Thorne
Manager
Philanthropic Advisory Services
Scotia Private Client Group
Bank of Nova Scotia Trust Company

Terry Marek
Senior Financial Advisor
Assante Financial Management

James Dunne
Wealth Advisor
ScotiaMcLeod

Monday, November 29, 2010 ~ Novotel Toronto North York Hotel

Canadians Among the World's Most Charitable

According to a recent global survey by UK based Charities Aid Foundation, Canadians rank third in the world when it comes to charitable giving. The most recent information available from Statistics Canada shows that Canadians donated $8.1 Billion in 2008. While donations declined in 2009, indications are that charitable contributions have bounced back significantly in 2010. For example, the third largest charitable organization in the U.S., The Fidelity Charitable Gift Fund, reported that contributions rose to $270 million during the first quarter of 2010, an unprecedented 109% increase in donations over the same period a year earlier.

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 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 feature tools, strategies and products designed to help advisors build their books in challenging economic times.

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 from their expertise!

Platinum Conference Partner

Canadian Cancer Society

Gold Conference Partners

EquiGenesis

Man

Conference Partners

Canadian Association of Gift Planners
CAGP•ACPDP

LEAVE A LEGACY™

Mackenzie INVESTMENTS

Meet Mike Skrypnek, Author of "Philanthropy: An Inspired Process"

Five attendees will win copies of Mike's newly published book.

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 the generous 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

"Excellent – I thought it was very well thought out. The information was well presented. It ran on time … and I loved that it wasn't a full day sales pitch." Mairi Decordova, Investors Group

*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 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
www.Mind*path*.ca

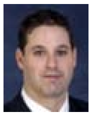
Past Conference Attending Organizations

The following organizations have attended this conference
~ AEGON Dealer Services
~ Ajax Financial Planning
~ Archdiocese of Toronto
~ Assante Financial Management Inc.
~ Benefaction Foundation
~ 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.
~ Etherington & Vukets
~ FaithLife Financial
~ 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
~ 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
~ ScotiaMcLeod
~ 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

8:30 AM Welcome / Introductory Comments from Mind*path* and introduction of Conference Chair Brad Offman

8:45 – 9:15 AM



Conference Chair
Brad Offman
Vice President, Strategic Philanthropy

Topic: 'The Opportunity of Philanthropy in a Financial Advisory Practice'
Including:
~ the post-recession philanthropic landscape in Canada
~ why philanthropy is more important than ever as an estate planning strategy
~ where advisors fit into the mix
~ highlights from Mackenzie's research study on advisors and philanthropy

9:15 – 10:00 AM Opening Keynote Speaker

Cheryl Hudson
Managing Partner

Topic: 'Philanthropic Giving from a Different Lens'
Including:
~ Articulating the philanthropic vision and mission
~ Develop the Donation Strategy – Making informed choices and selecting solutions that support the philosophy
~ Stewarding Family Wealth - Making philanthropy a family affair and understanding family dynamics
~ Measurement - Effective reporting to measure the impact of the social investment

10:00 – 10:15 AM ~ Morning Refreshment & Networking Break

10:15 – 11:15 AM

Tony Lee
Director, Gift Planning

Topic: "The Donor Decision-Making Process within the Charitable Giving Cycle"
Including:
~ initial awareness & how charitable organizations get on donors' radar
~ the central role of financial advisors
~ the information gathering process
~ why donors prefer some charities over others

11:15 – 12:00 Noon

Joshua E. Thorne
Manager, Philanthropic Services
Scotia Private Client Group

Topic: "An Overview of Donor Advised Funds"
Including:
~ the benefits of donor advised funds to facilitate philanthropic giving
~ the fund landscape: what products are on the market
~ where & how donor advised funds fit in a client's portfolio
~ caveats

1:00 – 1:45 PM

Terry Marek
Senior Financial Advisor

Topic: 'Using Insurance to Fund Philanthropy'
Terry's presentation will focus on The Donation Multiplier, a unique way of enhancing donation dollars.

1:45 – 2:30 PM

Ken Gordon
President & Founder

Topic: Leveraging Your Tax Efficient Donation
Including:

~ win-win philanthropic giving solutions for donors, charities, group giving and capital campaigns
~ an overview of strategic planned giving structures that have passed audit with CRA
~ charitable giving tax planning strategies within a 10 year time frame

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

2:45 – 3:30 PM

Jo-Anne Ryan
Vice President
Philanthropic Advisory Services

Topic: "Maximizing Your Philanthropic Gift"
Including:
~ Strategies with gifts of securities
~ Stock options
~ Holding companies
~ RIFS/RSPs

3:30 – 4:15 PM

Mike Skrypnek
Director
Wealth Management

Topic: 'Philanthropy ~ An Inspired Process'
Including:
~ my journey in philanthropy as an author
~ giving back: a financial advisor's perspective on the philanthropic process
~ the OneforOne $ Million Challenge

4:15 – 5:00 PM ~ Advisor Discussion Panel
Topic: "Advisors & Philanthropy ~ Practitioners Tell Their Story"

Keith Thomson
Managing Director

James Dunne
Wealth Advisor

Terry Marek
Senior Financial Advisor

~ hear from advisors who have successfully integrated philanthropy into their practices

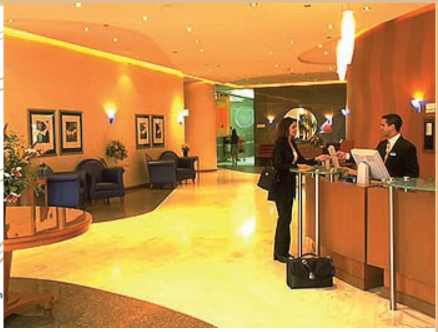
5:00 PM ~ Summary, Wrap-Up & Business Card Draws*

*for a Car Navigation GPS System + copies of 'Philatnropy: An Inspired Process' and 'Well Advised ~ A Planned Giving Reference Guide for Professional Advisors'

CONFERENCE LOCATION

Novotel Toronto North York Hotel
3 Park Home Avenue
Toronto, Ontario M2N 6L3
Tel. 416.733.2929

For directions to the hotel, click here.



Registration Form

Conference Fee:

$199.00 Per Delegate + HST = **$224.87** or $149.00 Per Delegate + HST = **$168.37** with *Canadian Cancer Society* or *Canadian Association of Gift Planners (CAGP)* or *Mackenzie Investments* Conference Partner discount (choose this option by selecting one of the discount codes below)

☐ #CCS1001 ☐ #CAGP1002 ☐ #MI1003

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

Delegate Name (please print name in full) Title

Total number of delegates:

______ x $224.87 = ____________

______ x $168.37 = ____________

Company Name

Address

City Province Postal Code

Phone eMail Address(es)

Note:

~ Continental Breakfast opens at 7:30 AM
~ Conference commences at 8:30 AM
~ Business Card Draw & Networking Cocktail Reception follow conference sessions at 5:00 PM

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 908
   Toronto, ON M4T 1N5
4. **Register by Phone**
   Call Tony Lewis 416.929-MIND (6463) ext. 225
   Toll Free 1.877.929.6463