Mindpath

Creating New Paths To Learning

Up to **6.0** CE Credits Available!*

4th 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
Joanne Swystun
Vice President, Director of Wealth Planning
Tacita Capital

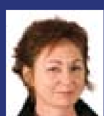
Nicholas Offord
President
The Offord Group

Kathryn De Carlo
Development Officer
Canadian Cancer Society

Nancy Griffin
Senior Investment Advisor
Macquarie Private Wealth

Brad Offman
Vice President, Strategic Philanthropy
Mackenzie Investments

Keith Thomson
Managing Director
Stonegate Private Counsel



Nicola Elkins
CEO
Benefaction Foundation

Mark Chabot
Vice President and Investment Advisor
TD Waterhouse

Ken Gordon
President & Founder
EquiGenesis Corporation

Thursday, October 27, 2011 ~ Mississauga Convention Centre

Canadians Among the World's Most Charitable

According to a 2010 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 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 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 feature tools, strategies and products designed to help advisors expand their books into a growing field as aging boomers increasingly think about the legacy they will leave behind.

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.

Platinum Conference Partner

Canadian Cancer Society

Gold Conference Partner

EQUIGENESIS CORPORATION

Conference Partners

CAGP•ACPDP

LEAVE A LEGACY™

Canadian Association of Gift Planners

Luncheon Sponsor

Mackenzie INVESTMENTS

*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* 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**

"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**

Past Conference Attending Organizations

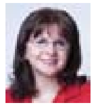
The following organizations have attended this conference:

~ 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.
~ Hilborn Group Ltd.
~ 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
~ 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 Joanne Swystun

8:45 – 9:15 AM



Conference Chair
Joanne Swystun
Vice President,
Director of Wealth
Planning

TACITA CAPITAL

As an experienced fundraising volunteer and wealth planning executive, Joanne will give her views on the conference theme as well as give a preview of the day ahead and speaker line-up.

9:15 – 10:00 AM

Nicholas Offord
President

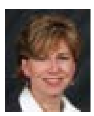
Offord Group

Topic: "Building Trust and Community in Uncertain Times"

Including:
~ ways in which advisors can build partnerships and trust that are sustainable
~ a look at the baby-boomer generation and how their giving has so much potential in the years ahead
~ the implications of the challenges in the economy and how community responds
~ the important role of charity in the life and relationships of high net worth individuals

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

10:15 – 11:15 AM



Kathryn De Carlo
Development Officer
Canadian Cancer Society

Canadian Cancer Society

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

Keith Thomson
Managing Director

STONEGATE
Private Counsel LP

Nicola Elkins
CEO

BENEFACTION

Topic: "Philanthropy: An Opportunity for Today's Wealth Advisors"

Including:
~ initiating the topic of philanthropy with clients
~ creating a win-win-win scenario between clients, charities and your practice
~ increasing AUM while assisting clients realize their charitable objectives
~ techniques to facilitate mutually beneficial working relationships with charities

12:00 Noon – 1:00 PM Event Luncheon

1:00 – 1:45 PM

Ken Gordon
President & Founder

EQUIGENESIS
CORPORATION

Topic: 'Leveraging Your Clients' Tax Efficient Charitable Donations'
Including:
~ an overview of structured giving and investment programs
~ win-win philanthropic giving solutions for donors and charities
~ benefits of tax efficient investments and structured giving programs
~ the advisor's value-add: where and how advisors fit into the process

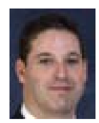
1:45 – 2:30 PM

Topic: "Using Insurance to Fund Philanthropy"

Including:
~ charity owned policy for younger clients
~ insurance as wealth replacement for life-time charitable gift
~ insurance to offset estate capital gains taxes
~ insured charitable annuities
~ life insurance funded charitable trusts

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

2:45 – 3:15 PM



Brad Offman
Vice President, Strategic Philanthropy

Mackenzie INVESTMENTS

Topic: 'Getting comfortable with charitable giving: An introduction to the advisor's role in philanthropic planning'

~ Why advisors should be focused on incorporating philanthropy into their practice
~ Basic strategies for talking to your clients about charitable giving
~ The tax treatment of charitable gifts in Canada
~ Specific gift planning strategies that are relevant to financial advisors

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

Moderator: Joanne Swystun

Mark Chabot
Vice President and
Investment Advisor

TD Waterhouse

Nancy Griffin
Senior Investment Advisor

Macquarie Private Wealth
MACQUARIE

Topic: "Advisors, Clients and Charities"

~ how the three parties can work together effectively
~ hear how advisors have integrated philanthropy into their practices by involving both clients and charities

4:15 PM ~ Summary, and Business Card Draws

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 the Canadian Cancer Society Sponsor discount or the Canadian Association of Gift Planners Sponsor discount

- ☐ The Canadian Cancer Society #CCS1101
- ☐ The Canadian Association of Gift Planners #CAGP1102

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) ____________________

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 416.929-MIND (6463), Toll Free 1.877.929.6463

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