The 10th 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 (Greater Toronto Area Chapter)

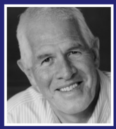
Conference Chair

Paul Nazareth
Vice President
Community Engagement
Canada Helps

Dr. John Valliant, PhD
Professor of Chemical Biology
McMaster University
Speaking on behalf of the
Canadian Cancer Society

Laura Mullin
Development Officer
Planned Giving
Canadian Cancer Society

Jason Stewart
President
Pol-Econ Research Inc.

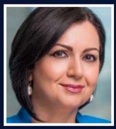


Peter Oliver
Founder
The Leacock Foundation
Co-Founder - Oliver &
Bonacini Restaurants

Meredith Agnew, CFA
Investment Officer
BenefAction
Foundation

Advisor Discussion Panel

Peter Bennett
Principal
Blueprint Wealth
& Estate Planning
Inc.



Tina Tehranchian
Planned Giving
Consultant
The Donor
Motivation Program

Candice Jay,
CIM, FSCI
Vice President
Pembroke Private
Wealth Management

Wednesday, May 16, 2018 ~ Burlington Convention Centre

Canadians Are Charitable

According to the latest information available, 82% of Canadians made a financial donation to a charitable or not-for-profit organization. Between 2010 and 2013, the total amount of charitable donations made by Canadians increased by 14% to $12.8 billion. A rough projection would put this number at north of $15 billion for 2017.

Professional Advisors Can Play a Pivotal Role

Advisors can play a pivotal role when it comes to facilitating their clients' charitable, philanthropic and legacy planning.

While some advisors fear losing assets under management, those who have made a commitment to integrating philanthropy into their practices report that over time, AUM gained outweigh losses. Advisors who are active in the philanthropic space often receive referrals from clients who they have helped with their charitable giving and legacy planning.

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

Coming Baby-Boomer Windfall

It is estimated that baby-boomers will benefit from windfall inheritances of between $1 & $5 trillion in the next 30 - 40 years.

Professional advisors can benefit from the resulting financial and tax planning process. Learn how at this industry-leading conference on philanthropy and charitable giving for advisors.

PLATINUM CONFERENCE SPONSOR

Canadian Cancer Society

CONFERENCE PARTNER

CAGP
GREATER TORONTO AREA CHAPTER

Canadian Association of Gift Planners

Unique Educational Program

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 addition 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.

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. Delegates say they often get as much or even more out of Mind*path*'s hands-on Q&A sessions than they do out of speakers' formal presentations. 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 Past Delegates to This Conference Have Said:

"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. Mindpath & 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

"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* Video

To view a 2 ½ minute video taken at last year's conference click here or on the image below:

***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.

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
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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 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

8:50 AM Welcome remarks from Mind*path* and introduction of Paul Nazareth, Conference Chair

9:00 AM Introductory Comments by the Chair

Paul Nazareth
Vice President,
Community Engagement
CanadaHelps.org

9:15 - 10:00 AM

Jason Stewart
President
Pol-Econ Research Inc.

Topic: "Behavioural Economics and Philanthropic Giving"

Including:
~ an introduction to behavioural economics as applied to charitable giving
~ emotional, motivational & social factors
~ the disconnect between charitable intentions, giving preferences and actual gifts

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

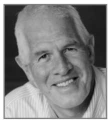
10:15 - 11:00 AM

Meredith Agnew, CFA
Investment Officer
BENEFACTION

Topic: "Master Your Philanthropy"

Including:
~ charitable giving in Canada
~ personal donation strategies
~ corporate donation strategies
~ estate donations
~ donor advised funds

11:00 AM - 12:00 Noon



Peter Oliver
Founder
THE LEACOCK FOUNDATION
Co-Founder
OLIVER & BONACINI HOSPITALITY

Topic: "Monty Python and The Meaning of Life"

Including:
~ how philanthropy adds meaning to individual lives as well as to society as a whole
~ what it means to give back
~ why we all have an obligation to give back more than we take out

12:00 - 1:00 PM ~ Event Luncheon

1:00 - 1:45 PM

Dr. John Valliant, PhD
Professor of Chemical Biology
McMaster University
Speaking on behalf of the Canadian Cancer Society

with an introduction by:

Laura Mullin
Development Officer,
Planned Giving
Canadian Cancer Society

Topic: "Unleashing New Ideas in the Fight Against Cancer"

Including:
~ Cancer Society-led research yields results in the battle against cancer
~ focus of current studies
~ how donor dollars impact research

1:45 - 2:30 PM

Paul Nazareth
Vice President,
Community Engagement
CanadaHelps.org

Topic: "Advancing Client Philanthropic Needs"

Including:
~ business owners' views on philanthropy
~ generational needs and philanthropic strategies
~ myths surrounding tax advantages and charitable giving
~ creating engagement in philanthropy between generations

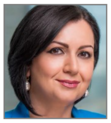
2:30 - 2:45 PM ~ Afternoon Refreshment & Networking Break

2:45 - 3:45 PM ~ Advisor Discussion Panel

Panel Moderator: **Paul Nazareth**

Peter Bennett
Principal
BLUEPRINT [WEALTH & ESTATE PLANNING INC.]

Candice Jay, CIM, FSCI
Vice President
PEMBROKE PRIVATE WEALTH MANAGEMENT



Tina Tehranchian
Planned Giving Consultant
THE DONOR MOTIVATION PROGRAM® We Motivate Planned Giving!

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 advisors use in the giving and legacy planning process
~ walking the talk; how giving back opens doors

3:45 PM ~ Summary, Wrap-Up & Business Card Draw

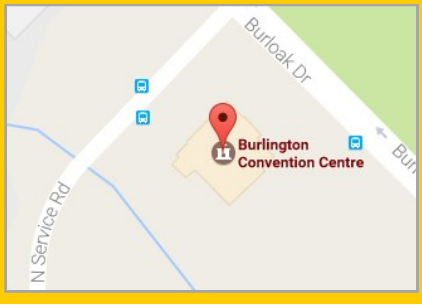
4:00 - 5:00 PM ~ Networking Reception

CONFERENCE LOCATION

Burlington Convention Centre

1120 Burloak Drive
Burlington, ON L7L 6P8

Tel. 905.319.0319



Registration Form

Conference Fees

Early Bird Special! Register by April 25 and Save

Register By April 25

$149.00 Per Delegate or Online Participant + HST = **$168.37**

After April 25

$199.00 Per Delegate or Online Participant + HST = **$224.87**

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 $149.00 = _________ + HST = _________
______ x $199.00 = _________ + HST = _________

Company Name ________

Address ________

City ________ Province ________ Postal Code ________

Phone ________ eMail Address(es) ________ ***Note:** All delegate confirmations will be sent out via eMail

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

Note:

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