

Philanthropy & Estate Planning Seminar:

A Lunch & Learn Event for Professional Advisors

Thursday, April 13, 2023

10 AM to 1 PM



Grey Roots Museum & Archives

102599 Grey Road 18

Owen Sound, ON Canada (West of Rockford)



Networking & Lunch provided

Certificates provided for Verifiable CE credit

\$50/person

Register: foundation@cfgb.ca or call 519 371 7203 by March 31, 2023

PROGRAM:



Stuart Reid, Executive Director, Community Foundation Grey Bruce
Willard VanderPloeg, Charitable Giving Advisor, Grey Bruce Health Services
"Foundation Resources for Gift Planning"



Local philanthropic professionals will introduce the services offered locally to support estate planning, explaining how your local community foundation and hospital foundations can help you advise a client and support a philanthropic plan. You will also learn about local foundations' participation in the national WillPower campaign. Wills aren't just a legal way to distribute your personal assets, they can be a powerful tool for change in the world. Adding a charitable gift to your Will for your clients is easier than you think – learn about resources and connections to help your planning.

Keynote Speaker Paul Nazareth,

Vice President, Education & Development, Canadian Association of Gift Planners,
"Business Building and Giving"

For many clients, charitable giving is something they are already doing, but, as always, planning is the key to multiplying both philanthropic impact and their personal fulfillment. Join us for business development insight into the current landscape of Canadian philanthropy and where your clients are already engaged in it. We will discuss and share case studies of not just tax benefits but more importantly how to have 'The Philanthropic Conversation' about how personal legacy through asset-based giving, financial and estate planning can help shape that vision including new insights from the estate and financial planning community including new resources on donations of life insurance, cryptocurrency and more.

