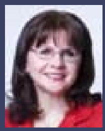
Mindpath

Creating New Paths To Learning

7.0 CE Credits Available!*

Doing Well by Doing Good Conference

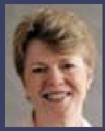
Growing Your Practice Through Philanthropy



Conference Chair
Joanne Swystun
Vice President
Tacita Capital

Rosanne Rocchi
Partner
Miller Tomson LLP

Brad Offman
Vice President, Strategic Philanthropy
Mackenzie Investments



Joan Blight
Senior Consultant
Strategic Philanthropy

Keith Thomson
Managing Director
Stonegate Private Counsel

Michael C. Vukets CA
Partner
Etherington & Vukets

Thursday, November 13, 2008 ~ (Bronte) Harbour Conference Centre, Oakville, Ontario

Canadians Giving More to Charity

According to a report by Statistics Canada, Canadians donated $8.5 Billion in 2006, an increase of 7.6% over the previous year.

One of the possible reasons for this increase was a change to the tax code in the Federal Budget of 2006 whereby capital gains were eliminated on securities donated directly to a charity making them tax-exempt.

The donation of securities benefits both the donor and the charity. By avoiding the capital gains generated by the sale of the shares prior to donation, the amount available to be donated increases.

While charitable donations of securities appear to have softened in 2008 due to price pull-backs in the markets, it is expected that this sector of charitable giving will grow significantly over time.

Tools, Strategies & Products to Grow Your 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 sales tools, strategies and products designed to help advisors build their books.

Advisor Discussion Panel

Hear first-hand from our panel of Financial Advisors who have successfully built significant volumes of business through philanthropic giving.

Mind*path* Conferences Feature An Enhanced Learning Model

Delegates to Mind*path* conferences appreciate the enhanced learning model resulting from direct access to industry experts and extended Question and Answer sessions.

In fact, delegates tell us they often get more out of Mind*path*'s generous Q&A sessions than they do out of the speaker's formal presentation. In addition, the Mind*path* learning model enables delegates to follow along with speaker comments and presentation materials through print-outs of PowerPoints and other presenter documents.

Conference Partner
Canadian Association of Gift Planners
CAGP•ACPDP™

LEAVE A LEGACY™

Platinum Partner
Mackenzie CHARITABLE GIVING FUND

*CE Credits are Professional Development Credits from Advocis. Advisors wishing IROC / IDA Credits may apply to their internal Professional Development and Training Departments for program assessment.

Delegates Speak Highly of the Mind*path* Learning Experience

"Excellent - new knowledge base of information. Cutting-edge. Great speakers for the most part. Good time after each presentation left for discussion. Kept on time. Great venue." ~ **David Lyon, Financial Advisor, Dundee Private Investors**

"Excellent speakers covering many different aspects of the subject matter. Excellent time for our Q&A." ~ **L. John Wilson, Financial Planner, Equity Associates**

"I just wanted to let you know how much I enjoyed the conference last week on the Coming Retirement Income Crisis. There were some absolutely fabulous speakers and some good interactions with the people there." ~ **Conrad Toner, BA, CFP, CLU Financial Horizons Group & Investia Financial Services Inc.**

"You have nailed the kind of day, in terms of quality when I look for CE credits." ~ **Don Macfarlane, CFP, Assante Financial Management**

"I have enjoyed both of the Mind*path* Conferences that I have attended. They are professionally run, have top-notch speakers and have been worth my time to attend." ~ **John Chapman, Investment Advisor, Dundee Securities**

Free Book Bonus !
The first 50 Advisors to register will receive a free copy of Elaine Kelly's book: **Give Smart**

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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

Outside-the-Box Thinking

Mind*path* is a different kind of educational conference company for the financial services industry. The goal of Mind*path* conferences is to bring ‘outside-the-box’ thinking and leading-edge learning programs to financial advisors, planners, brokers and investment advisors. Timely information from top industry experts and attendee engagement facilitates the learning process.

Mind*path*’s Principals Are Financial Industry Veterans

Mind*path* financial conferences are content-driven by industry professionals.

Two of Mind*path*'s principals, **Don Bridgman** and **Daniel Tutton**, are financial industry veterans who bring a combined total of nearly 50 years experience in the financial services sector to the company.

Daniel Tutton, President, is a nineteen-year veteran of the financial services industry. Previously, Dan served as Senior Vice President of one of Canada’s leading financial services companies. He has been involved with educational conferences and special events throughout his business career.

Dan is actively involved with Careforce International, an organization devoted to helping children in need around the world.

Don Bridgman is also a principal of Mind*path* and brings over 28 years of experience in the financial services industry to the company. He has been an advisor, a senior marketing and sales executive, an industry consultant, a public speaker, a conference manager and workshop facilitator, as well as a trainer and performance coach with unique expertise in personal strategic planning.

He currently co-owns and manages one of the largest branches of a leading Canadian wealth management firm.

As a result, Don remains close to the information and education needs of advisors on a daily basis resulting in topical, relevant and up-to-date programs for Mind*path* educational conferences.

He also sits on a wide range of community, charity and philanthropic boards and devotes a considerable amount of time helping these groups with their fund-raising activities.

Mind*path* CEO **Dan Jerred** has over 30 years business experience and brings a depth of expertise in the creation and execution of cutting-edge financial conferences. He has worked in senior capacities with several of Canada’s leading financial conference companies before becoming CEO of Mind*path*.

He is a past director of the Canadian Childrens Foundation (now Kids Help Foundation) and was closely involved in the development and launch of Kids Help Phone, the national 1-800 helpline for children in distress.

PROGRAM AGENDA

8:20 AM Welcome / Introductory Comments from Mind*path* and Conference Chair Joanne Swystun

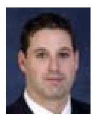
8:30 – 9:30 AM

Joan Blight
Senior Consultant
Strategic Philanthropy

Topic: ‘The Importance of Philanthropy as Part of Your Financial Advisory Practice’
Including:
- ~ the philanthropic landscape
- ~ the important role of advisors in the charitable giving process
- ~ opportunities that philanthropy provides to grow our practice
- ~ how financial advisors can add value to the philanthropic planning process

9:30 – 9:45 AM ~ Morning Refreshment & Networking Break

9:45 – 10:30 AM



Brad Offman
Vice President, Strategic Philanthropy
Mackenzie Investments

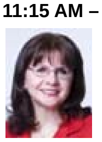
Topic: ‘The Advisor’s Role In Charitable Giving’
Including:
- ~ where Charitable Giving fits into an overall financial plan
- ~ why it is important to raise the subject of giving
- ~ how to tactfully raise the subject of Charitable Giving

10:30 – 11:15 AM

Elaine Kelly, MBA, CFP, FMA
Financial Advisor and Author, ‘Give Smart’ Meridian Credit Union

Topic: ‘The Seven Giving Personalities – Keys to Improved Client Understanding’
Including:
- ~ beyond basic client understanding: how to reveal your clients deeper values!
- ~ practical scripting ideas to deepen your client relationships
- ~ discover the seven faces of philanthropy, their various motivations and how you can supply a charitable giving strategy that meets client needs
- ~ help your clients be successful in their most important life goals
- ~ get closer to your clients, building your position as a trusted advisor through the charitable discussion

11:15 AM – 12 Noon



Joanne Swystun
Vice President, Tacita Capital

Topic: ‘Planning To Give – Philanthropic Strategies for the HNW Client’
Including:
- ~ the giving challenges (and opportunities) facing HNW clients
- ~ managing the “philanthropy portfolio”
- ~ getting the family involved
- ~ legacy planning (doing good after you’re gone)

12:00 Noon – 1:00 PM Event Luncheon

1:00 – 2:00 PM

Rosanne Rocchi
Partner, Miller Tomson LLP

Topic: ‘Selected Legal Aspects of The New Philanthropy’
Including:
- ~ tax planning techniques to facilitate charitable giving
- ~ building loyalty and branding your business
- ~ corporate gifts and sponsorships
- ~ community involvement
- ~ business initiatives with charities

2:00 – 2:15 PM ~ Afternoon Refreshment & Networking Break

2:15 – 3:00 PM

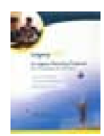
Michael C. Vukets CA
Partner
Etherington & Vukets

Topic: ‘Using Insurance to Fund Philanthropy’
Including:
- ~ tools and strategies to help clients identify their philanthropic capacity
- ~ identifying, addressing and penetrating the ultra high net worth market
- ~ integrating tax strategies and insurance solutions to enhance donation levels

3:00 – 3:30 PM ~ **An Overview of Donor Advised Funds**
Brad Offman, Vice President, Strategic Philanthropy, Mackenzie Investments

- ~ overview of Mackenzie charitable giving products

3:30 – 4:00 PM
Joan Blight
Senior Consultant, Strategic Philanthropy



- ~ LegacyPRO: a planning program for Financial Advisors

4:00 – 5:00 PM
Advisor Discussion Panel

Keith Thomson
Managing Partner
Stonegate Private Counsel LP

- ~ hear from Advisors who have built successful practices by incorporating philanthropy into their business models
- ~ other panelists to be announced shortly

5:00 PM
Joanne Swystun
- ~ summary and actionable items from the day

5:15 PM ~ Business Card Draw for a Global Positioning System

5:15 – 6:30 PM ~ Cocktail Reception

CONFERENCE LOCATION

Harbour Conference Centre (Bronte)

2340 Ontario Street
Oakville, Ontario L6L 6P7

Phone: 1 (905) 827-1315

Registration Form

Conference Fee:

1. Regular Admission Price: $249.00 + GST = **$261.45**
2. Sponsor's Discounted Admission Price: $199.00 + GST = **$208.95**

To take advantage of the Sponsor's Discount, simply circle or underline the Sponsor's Code below and register at the lower rate.

Mackenzie Investments: #MIDWDG801

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 ____________

Delegate Name (please print name in full) ____________ Title ____________

Total number of delegates:

______ x $249.00 = _________ + GST = _________

______ x $199.00 = _________ + GST = _________

Company Name

Address

City Province Postal Code

Phone Fax # eMail Address(es)

Note:

~ Continental Breakfast opens at 7:30 AM
~ Conference commences at 8:20 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 416.929-MIND (6463)
   Toll Free 1.877.929.6463