



## 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 Mindpath 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 Mindpath 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



### Conference Partners



Canadian Association of Gift Planners

### Luncheon Sponsor



### Mindpath Conferences Are Highly Interactive & Educational

Delegates to Mindpath 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 Mindpath's hands-on Q&A sessions than they do out of the speaker's formal presentation.

As well, Mindpath 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 Mindpath Conferences also qualify for IIROC CE Credits. Mindpath is available to facilitate the IIROC CE Credit Approval process with attending advisors through their Professional Development and Training Departments.

## 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 Mindpath and introduction of Conference Chair Joanne Swystun**

**8:45 – 9:15 AM**



**Conference Chair**  
**Joanne Swystun**  
Vice President,  
Director of Wealth  
Planning



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



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



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



**Nicola Elkins**  
CEO  
**BENEFACATION**

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



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



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



**Nancy Griffin**  
Senior Investment Advisor



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)

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 Mindpath 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