

2010 JOURNEYS IN CHARITABLE GIVING

This conference will provide valuable up-to-date information to professionals working with clients to achieve their charitable giving goals through estate and financial planning.

The conference is targeted to professional advisors including: accountants, lawyers, trust officers, financial planners, investment advisors, insurance advisors, wealth management consultants and planned giving officers.

*****Under review for ADVOCIS CE Credits*****

REGISTRATION FEE - \$70.00

Date: Thursday, May 27, 2010
Time: 7:30 a.m. – 12:15 p.m.
Place: Casablanca Winery Inn
 4 Windward Dr., Grimsby

Contact: Liz Palmieri
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7:30 - 8:30	Registration and Continental Breakfast
8:30 - 9:10	Tax Aspects of Charitable Giving in Canada Brad Offman, Mackenzie Financial Corporation
8:15 - 9:40	Ethical Dilemmas Faced by Charities and their Advisors Steve Latinovich, Flett Beccario; Penny Towndrow, RetireLight; Andrew Walker C.A., Durward Jones Barkwell & Company;
9:45 - 10:25	Charitable Gift Planning for the Entrepreneur/Small Business Owner Calvin Beresh, Sharpe, Beresh & Gnys; Steve J. McInnis, ScotiaMcLeod, Jim Bird, Manulife
10:25 - 10:45	Break
10:50 - 11:30	Is a Private Foundation, Commercial Gift Fund or Donor-Advised Fund at a Community Foundation the Best Solution for Your Client? David Van Der Woerd, Ross & McBride; Brad Offman, Mackenzie Financial; Anne L. Brayley, Toronto Community Foundation
11:35 - 11:55	The donor, the advisor and the charity. Each member of this panel will talk about their motivation and role in the gift planning process
12:00 - 12:10	Leave a Legacy Program Tamara Coleman-Lawrie, Chair, Leave a Legacy, Canadian Association of Gift Planners, Golden Horseshoe Roundtable
12:15	<i>Wrap-up, evaluation and thank you</i>



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REGISTRATION FORM

LAST DATE TO REGISTER IS MAY 25th

Name: (please print) _____

Company/Organization: _____

Mailing Address: _____

Postal Code _____

Phone: _____ Fax: _____

Email: _____

Method of payment:

\$70 cheque enclosed (cheques payable to Niagara Community Foundation)

\$70 cheque in mail

\$70 charge on my credit card: MasterCard Visa

Credit Card # _____ Expiry Date: _____

Name on Credit Card: _____

Signature: _____

Orders can be faxed to (905) 684-2337

**Niagara Community Foundation
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www.niagaracommunityfoundation.org