Mindpath Conferences

Up to 6.0 CE Credits Available*

The Ottawa 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 Mind*path* and the Canadian Association of Gift Planners

Conference Chair
Paul Nazareth
Manager, Philanthropic Advisory Services
Scotia Private Client Group

Susan Horvath, CFRE
Vice President, Leadership Philanthropy
Canadian Cancer Society

Ian Bird
President & CEO
Community Foundations of Canada

Kathryn De Carlo
Development Officer
Canadian Cancer Society

Jack Bergmans
Founding Partner
Bequest Insurance

Adam Spence
Manager, Special Projects
MaRS Centre for Impact Investing
Founder, SVX I Invest for impact

Advisor Discussion Panel
Carol Willes
Senior Will & Estate Planner
Scotia Private Client Group

Advisor Discussion Panel
Bob Strachan
Wealth Manager
BMO Nesbitt Burns

Monday, April 15, 2013 ~ Cedarhill Golf & Country Club ~ Ottawa, Ontario

Massive Transfer of Wealth To Take Place In Canada

It is estimated that Canadian baby-boomers can expect to inherit between $1 & $5 trillion in the next 30 – 40 years.

Of this amount, projections are that well over 50% will flow into the charitable sector.

Financial advisors are playing a pivotal role in facilitating their clients charitable donations creating a win-win scenario for charities, clients and their practices. Attend this unique, one-day educational conference and learn how your practice can benefit from the coming tsunami of wealth transfer.

Hear About Trends in Impact Investing, Socially Responsible Investments and Directed Giving

Many Canadian Institutional Investors have signed on to the Principles for Responsible Investment created by the United Nations Environment Program.

Principles for Responsible Investment or PRI are guided by concerns over environmental, social and governance issues.

Likewise, a growing number of Foundations, HNW individuals and Plan Sponsors are questioning how certain investment opportunities are co-relating social and environmental value to financial returns.

To this end, more and more donors are becoming more particular as to how and where their charitable dollars are being spent.

Growing Your Financial Advisory 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 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 cover tools, strategies and products designed to help advisors expand their books into a growing field as aging boomers who are increasingly thinking 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

Conference Partner
Canadian Association of Gift Planners

CAGP•ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONS PLANIFIÉS

LEAVE A LEGACY™

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.

In fact, delegates tell us they often get as much or even more out of Mind*path*'s hands-on Q&A sessions than they do out of the speaker's formal presentation.

As well, Mind*path* 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

"Thanks for organizing a great conference." **Ben Kendall**, Investment Advisor, CIBC Wood Gundy

"Great conference - a good roster of engaging speakers presenting on a cross-section of relevant topics." **Gregory Brown**, Desjardins Financial Security

*CE Credits are Professional Development Credits from The Institute of Advanced Financial Education on behalf of Advocis.
Most Mind*path* Conferences also qualify for IIROC CE Credits. Mind*path* is available facilitate the IIROC CE Credit Approval process with attending advisors through their Professional Development and Training 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
w w w . m i n d p a t h . c a

Representatives from the following organizations have attended this conference in the past

~ 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.
~ 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
~ Rae & Lipskie
~ Raymond James
~ 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
~ 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
~ YMCA of Greater Toronto

PROGRAM AGENDA

8:45 AM Welcome remarks from Mind*path* and introduction of Conference Chair

Conference Chair
Paul Nazareth
Manager, Philanthropic Advisory Services
Scotia Private Client Group

9:00 – 9:45 AM

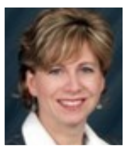
Ian Bird
President & CEO
COMMUNITY FOUNDATIONS OF CANADA

Topic: "Philanthropy and Charitable Giving in Canada ~ The Changing Landscape"

Including:
~ the charitable giving landscape in Canada
~ recent trends and developments
~ the increasing sophistication of donors
~ how community foundations are responding to donor needs

9:45 – 10:00 AM ~ Morning Refreshment & Networking Break

10:00 – 11:00 AM



Kathryn De Carlo
Development Officer
Canadian Cancer Society

Topic: "Donor Personalities ~ Identifying the Seven Most Common Donor Personality Traits"

Including:
~ when, why and how to identify the seven donor personality types
~ using this information to unlock donor motivations and goals
~ leveraging donor personality traits into stronger client relationships
~ tailoring charitable giving strategies to donor personality types

11:00 – 11:45 AM

Jack Bergmans
Founding Partner
Bequest Insurance

Topic: "Giving & Life Insurance"

Including:
~ integrating life insurance solutions in philanthropy
~ overview of the top life insurance strategies used for charitable giving
~ highlight particular opportunities available for business owners
~ discuss current tax environment affecting the donation of life insurance policies

12:00 – 1:00 PM ~ Event Luncheon

1:00 – 1:45 PM

Susan Horvath, CFRE
Vice President, Leadership Philanthropy
Canadian Cancer Society

Topic: "Building Donor Loyalty"

Including:
~ the importance of referrals
~ establishing common ground and goals
~ effective communication strategies
~ tailoring your message

1:45 – 2:15 PM

Adam Spence
Manager, Special Projects
MaRS Centre for Impact Investing
Founder, SVX I Invest for impact
MaRS CENTRE FOR IMPACT INVESTING

Topic: "Impact Investing"

Including:
~ what is impact investing and what is the benefit to clients and advisors ?
~ how impact investing can be a conversation starter with clients
~ how advisors can integrate impact investing client charitable giving portfolios

2:15 – 2:30 PM ~ Afternoon Refreshment & Networking Break

2:30 – 3:00 PM

Paul Nazareth
Manager, Philanthropic Advisory Services
Scotia Private Client Group

Topic: "Broaching the Topic of Philanthropy with Your Clients"

Including:
~ how to confirm that philanthropy is a priority for clients
~ how to talk to baby boomers selling a business and considering a legacy
~ what role will social media play in starting and building relationships

3:00 – 4:00 PM ~ Advisor Discussion Panel

Moderator: **Paul Nazareth**

Carol Willes
Senior Will & Estate Planner
Scotia Private Client Group
Scotia Private Client Group

Bob Strachan
Wealth Manager
BMO Nesbitt Burns
BMO Nesbitt Burns

Topic: "Advisors, Clients and Charities "

Including:
~ how the three parties can work together effectively
~ hear how advisors have integrated philanthropy into their practices by involving both clients and charities

4:00 – 4:15 PM ~ Summary, Wrap-Up & Business Card Draw

4:15 – 5:00 PM ~ Networking Reception

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
w w w . m i n d p a t h . c a

CONFERENCE LOCATION

Cedarhill Golf & Country Club
56 Cedarhill Drive
Ottawa, ON K2R 1C5

Tel. 613.825.2186

Registration Form

Conference Fee:

$199.00 Per Delegate + HST = **$224.87** or $149.00 Per Delegate + HST = **$168.37** with Sponsor discount

- ☐ No Sponsor Discount Required
- ☐ Canadian Cancer Society #CCS701
- ☐ Canadian Association of Gift Planners #CAGP702

Group discount: 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

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

____
Phone Email Address(es) (All delegate confirmations will be sent out via emails)

Note:
~ Continental Breakfast opens at 7:30 AM
~ Conference commences at 8:45 AM
~ Business Card Draw & Networking Cocktail Reception follow conference takes place between 4:00 PM and 5:00 PM