



CONTINUING EDUCATION POINTS TRACKER

CFRE International has developed this form as a way for you to quickly track (and keep in your files!) the continuing education sessions you have attended. Simply check the boxes next to the sessions you attended. At the end of the conference, add up the total number of hours. Keep this sheet and you will be ready to complete your application form. All of the session slots listed are eligible for continuing education points on your CFRE application for initial certification and/or recertification. Sessions not listed here are not eligible for points.

Activity Organizer: Canadian Association of Gift Planners
Title of Activity: 23rd Annual CAGP National Conference
Names of Presenter(s): Various
Dates and Location: April 6-8, 2016 in Banff, Alberta

Date: 6 April, 2016

Session 1: 8:00 – 9:00 am (1.0 pts)

- 1.1 Plenary: Where Do We Go From Here?
Canadian Gift Planning Now!

Session 2: 9:15 – 10:45 am (1.5 pts)

- 2.1 Estate Administration (Master Class)
 - 2.2 Small Shops: How to Start a Planned Giving Program (Master Class)
 - 2.3 What Do I Do Now? Ethical Issues, Twists and Turns
 - 2.4 Donor Advised Funds Two Ways
 - 2.5 Unique Gift Planning from Entrepreneurs
 - 2.6 Authentic Leadership: The Key to Successful Planned Giving Programs

Session 3: 11:15 – 12:15 pm (1.0 pts)

- 3.1 Estate Administration (continued)
 - 3.2 Small Shops: How to Start a Planned Giving Program (continued)
 - 3.3 Insurance Gifts – Are You Really Getting a Gift?
 - 3.4 Putting the Donor First – Engage, Inform and Empower Your Prospects
 - 3.5 Dancing with Values
 - 3.5 Recent Legal Developments in Gift Planning

Session 4: 2:30 – 4:00 pm (1.5 pts)

- 4.1 Plenary: FRANK Talks

Date: 7 April, 2016

Session 5: 8:00 – 9:00 am (1.0 pts)

- 5.1 Plenary: “I am not a philanthropist!”
Planned Giving and the Rising Generation
Gena Rotstein, Dexterity Consulting

Session 6: 9:15 – 10:45 am (1.5 pts)

- 6.1 Shine a Light on Gift Annuities
 - 6.2 When Is A Gift Not A Gift (And Why Should You Care)
 - 6.3 Protecting the Rights and Interests of an Aging Population
 - 6.4 Writing Workshop: Collect, Write and Share Your Own Legacy Stories
 - 6.5 Faith & Philanthropy: Understanding the Faith-Based Donor

Session 7: 11:15 am – 12:15 pm (1.0 pts)

- 7.1 Rejuvenate Your Planned Giving Program
 - 7.2 Social Impact Bonds-A Creative Tool for Advisors, Charities and Government
 - 7.3 Executor Dialogue: Engaging Sherpas on the Demographic Mountain of Modern Gift Planning
 - 7.4 Testamentary Charitable Gifting Revisited
 - 7.5 Service Value-Creating More for HNW Donors

Session 8: 2:15 – 3:15 pm (1.0 pts)

- 8.1 Advisors Amplify Your Ask
- 8.2 Is It Safe? Addressing Donor Concerns with Governance and Stewardship of Donated Funds
- 8.3 Nine Simple Things to Increase Your Legacy Gifts
- 8.4 In Black and White: A Practical Guide to Record-keeping
- 8.5 The Changing Face of Philanthropy: Working With Female Donors

Session 9: 3:45 – 4:45 pm (1.0 pts)

- 9.1 The Use of Life Insurance and Registered Gifts in Gift Planning
- 9.2 Government Relations at CAGP
- 9.3 The Overhead Dilemma
- 9.4 Incentives or Undue Influence: Rewarding Gift Planners Without Exposing Your Gifts or Your Charity to Challenge
- 9.5 Combining the Art and Science of Fundraising in the Emerging New School of Philanthropy

Date: 8 April, 2016

Session 10: 8:00 – 9:00 am (1.0 pts)

- 10.1 Plenary: The Changing and Unchanging Realities of Gift Planning

Session 11: 9:15 – 10:45 am (1.5 pts)

- 11.1 Estate Accounting -- It's All in the Details! (Master Class)
- 11.2 Mastering the Art of Telling Stories by Sharpening Your Oracy Skills (Master Class)
- 11.3 Managing Expectations – Gift Acceptance and Naming Policies
- 11.4 Gift of Residual Interest: Scrambling up the Mountain
- 11.5 Taking Donors From Listening to 'Feeling'
- 11.5 New World Recruiting & Employment Strategies

Session 12: 11:15 – 12:15 pm (1.0 pts)

- 12.1 Estate Accounting -- It's All in the Details! (Continued)
- 12.2 Mastering the Art of Telling Stories by Sharpening Your Oracy Skills (Continued)

- 12.3 Win-Win-Win Canadian Style: Achieving Dynamic Integration With Fundraising Colleagues

- 12.4 The Skills the Future Will Demand
- 12.5 Family Matters - Enabling Passionate Discussions
- 12.6 Building an Integrated Brand Story

Session 13: 12:30 – 1:30 pm (1.0 pts)

- 13.1 Plenary: Success by Design

Total number of points attained: ____ /15