



"Ask The Experts on Planned Giving"

A joint panel discussion with CAGP

Thursday, December 15, 2011

11:30 a.m. to 1:30 p.m.

Norwood Hotel, 112 Marion St.

ABOUT THE SESSION

Where does planned giving fit in your organization? Does your organization have procedures in place to move your donors through the giving pyramid to become planned giving donors? How do your development officers work together? Do the annual giving and major gifts officers meet regularly with the planned giving officer? How is information shared? Where does stewardship fit in? How do small shops incorporate planned giving in their program?

Find the answers to all of these questions and more as our panel meets to discuss planned giving and how to incorporate it into your development plan.

ABOUT THE PANEL

Genevieve Delaquis, CFRE

Director of Advancement

Balmoral Hall School

Geneviève Delaquis, CFRE Employed at Balmoral Hall School since 1998, Geneviève has had her fingers in many areas of development including annual giving, events, donor relations, major & planned gifts. She is a board member of the Canadian Association of Independent Schools and obtained her CFRE designation in 2010. Geneviève looks forward to sharing ideas, stories and strategies to incorporate planned giving in a small shop.

Beth Proven, CFRE

Manager, Planned Giving

University of Manitoba

Beth Proven, BA, CFRE, CIM has been a fundraiser for 17 years. In that time she has been privileged to facilitate hundreds of people in making over \$65 million in donations that make a difference. She has been the Manager of Planned Giving at her alma mater, the University of Manitoba, since 2004, is past president of the CAGP Manitoba Roundtable and is currently a course coach for the Dale Carnegie Course in Winnipeg.

Leslie Weir, MA, CFRE, ACFRE

Director of Family Philanthropy

The Winnipeg Foundation

Leslie Weir, MA, CFRE, ACFRE is currently Director of Family Philanthropy at The Winnipeg Foundation. A fundraising professional for over 25-years, Leslie has held positions at the University of Manitoba, Health Sciences Centre Foundation and United Way of Winnipeg. Leslie holds an MA in Philanthropy and Development from Saint Mary's University of Minnesota and is one of a handful of individuals to have received not only her CFRE but an ACFRE as well.

Moderator: Ron Bailey, CFRE, Ron Bailey & Associates, AFP Manitoba Chapter President

SEE NEXT PAGE FOR REGISTRATION INFORMATION!

"ASK THE Experts Panel on Planned Giving"
Thursday, December 15, 2011
Norwood Hotel, 112 Marion St.

REGISTRATION FORM

NAME _____ NAME _____

NAME _____ NAME _____

NAME _____ NAME _____

ORGANIZATION _____

ADDRESS _____

CITY _____ PROV _____ POSTAL CODE _____

TEL: _____ EMAIL _____

- FEES:**
- AFP Members - \$30.00
 - RRC Essentials Grads - \$30.00
 - CAGP Members - \$30.00
 - Non-Members - \$45.00

PAYMENT:

Cheque/Cash (Payment On-Site) – Payable to AFP Manitoba Chapter

Please Invoice – Provide Contact Person's Name and Email:

NAME: _____ EMAIL: _____

Credit Card - ___ Visa ___ M/C

****Note – The Winnipeg Foundation** will be processing credit cards for AFP, their name will appear on your statement.

_____ Exp. ____ / ____

Signature: _____

SPECIAL DIETARY REQUIREMENTS - Allergies Vegetarian Please specify: _____

HOW TO REGISTER

FAX COMPLETED FORM TO 897-8094

Or

IF MAILING SEND ORIGINAL FORM AND PAYMENT TO:

Lise Carbonneau, Administrator, AFP Manitoba Chapter,
950 Borebank Street, Winnipeg, MB R3N 1G6

Tel: (204) 832-1512 / Fax: (204) 897-8094

Email inquiries: whirlwind@shaw.ca

CANCELLATION POLICY

Substitutions are welcome. However should you wish to cancel full refunds are provided up to **December 12, 2011, 12:00 Noon**. No shows are subject to the full event fee.