Thursday, April 27th, 2017
12:00-12:30 - Registration, Networking and Lunch
12:30-1:30 – Panelist Discussion – Approved for 2 CE credits.

April Education Session:

**Financial Advisors & Charities: Bridging The Disconnect**

A Panel Discussion

In this exclusive panel discussion our 4 panelists will enlighten us on the ways Charities and Advisors can work more collaboratively together towards a common goal -- helping to better service our donors/clients. They will share some of the current challenges and opportunities ahead for helping donors/clients achieve their life goals as well as their philanthropic and legacy for those who are charitably inclined.

**Charities:** Do you want to know what Financial Advisors are asking and telling your donors? Do you know exactly what Financial Advisors need or want from you? Are there ways we could be working better together with Advisors to help donors/clients realize both their philanthropic and legacy goals.

**Advisors:** When you reach out to charities on behalf of your clients, what are the crucial pieces of information you need? With your charitable interactions: what works well and what needs improvement? Do you have all the tools you need to ask the crucial questions to have the philanthropic conversation with your clients?
Our panelists are (from left to right):

Ted Rechtshaffen, President and CEO, TriDelta Financial
Charlotte Paul, Financial Advisor, Raymond James
Peter Bennett, Principal Blueprint Wealth & Estate Planning
Tina Tehranchian, Planned Giving Consultant, The Donor Motivation Program

Register Here:

Location:
Ted Rogers School of Management
Room 1-003
(7th Floor from street level)
55 Dundas St W, Toronto, ON M5G 2C3
(Bay and Dundas)

Tickets:
CAGP members, $55; non-members, $70;
Register By: April 25th, 2017

Registered but you cannot attend? Substitutions or cancellations must be made at least 48 hours prior to the event. An invoice will be sent to guests who have not notified the CAGP GTA.