

Be Our Guest for Breakfast and learn how to

Enhance Client relationships through Philanthropic Planning

A professional advisors forum hosted by your Community Foundation

Being able to connect with a client through philanthropic planning provides an opportunity to have positive conversations. Advisors whose clients know they care about them and what they value—beyond the important matter of investment returns—have fewer concerns about client retention. These deeper, richer relationships lead to a satisfying client experience and more referral opportunities. This forum will explore ways advisors can talk with clients about charitable giving and review philanthropic planning scenarios. .

*** This presentation qualifies for a 1 hour technical Continuing Education Credit by Advocis. ***

Presenter: Joshua E. Thorne -

Joshua Thorne, an industry respected speaker and presenter, is a philanthropic planner to private clients and their advisors. He has over 14 years experience working at charities, including Queen's University, the University of Western Ontario and the Hamilton Community Foundation. As Manager, Philanthropic Advisory Services for Scotia Private Client Group, Joshua develops comprehensive charitable gift plans centered on client's philanthropic priorities with solutions ranging from bequests and charitable trusts to donor-advised funds and private foundations. Joshua obtained his Bachelor of Arts Degree in Political Studies from Queen's University.



Speaking on behalf of the Canadian Association of Gift Planners where he is a faculty member for CAGP's Comprehensive Gift Planning Course and also serves on its Government Relations and Education Committees, Joshua brings a wealth of knowledge and experience from various perspectives. .

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CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIES

Date: Thursday, June 17, 2010
Time: 7:30 a.m.—9:00 a.m.
Place: Best Western The Parlour
Historic Inn & Suites
101 Wellington Street, Stratford

For more information and to register
please contact Paul Thistle at

pthistle@spccf.ca.

Please RSVP by Friday June 11

This event is generously supported by the Ontario Trillium Foundation and the Scotiabank Group.