

MFA-P™ PHILANTHROPY SERVICES SPECIALIST



ESPECIALLY FOR:

- Accounting and Tax Practitioners
- Estate Planning Lawyers
- Gift Planning Advisors, Trust Officers
- Wealth Advisors, Financial Planners
- Insurance Advisors

FACULTY OF STRATEGIC GIFT PLANNING

Brought to you by:



Strategic Planning for Charitable Giving

There is an emerging investment trend increasingly important to investors of all ages: strategic philanthropy. But few advisors deliver what clients want: integrating personal values with tax and financial plans.

WHY BECOME AN MFA-P™ STRATEGIC PHILANTHROPY SPECIALIST?

Build trusting relationships with your clients and help them make a difference in the world through charitable giving.

STUDY ONLINE - EVERYTHING IS INCLUDED:

- > Personal course selection consultation and virtual campus orientation
- > Lesson plans and study plans
- > Personal instructor support by email
- > Comprehensive Knowledge Journal
- > EverGreen Explanatory Notes
- Online Research Library
- > Practical case studies using well-known professional software
- > Calculators and tools you can use immediately
- > Testing and certification
- > CE/CPD accreditation by various professional bodies



“CAGP is excited about realizing a long-time dream to offer a designation to advisors who want to work more closely with charitably-minded clients to have community impact in mind when planning their finances, retirement and succession.”

*Ruth MacKenzie,
President and CEO, CAGP*

Let's Connect :

Phone: 1-866-953-4769 | Email: registrar@knowledgebureau.com | www.knowledgebureau.com

DIFFERENTIATE YOURSELF

THE MFA-P™ provides specialized professional credentials to enable high-value philanthropic planning for individual and family legacies

- > Learn to have highly satisfying conversations with clients about charitable giving
- > Address their big fears: that gifts will not be used
- > Plan for solutions that are tax-efficient now and in the future



Introduction to Strategic Philanthropy

Learn how to tap into clients' philanthropic goals. In the process, increase opportunities to build trust by understanding clients' values and critical personal causes. Engage and get multiple stakeholders on the same page, with objectives for deploying a successful charitable giving strategy. Obtain a precise understanding of how to integrate the tax aspects of charitable giving.

In this course you will learn how to plan and integrate your clients values with new technical expertise.

Six modules cover:

- Why Families Give
- The Role of the Advisor
- Personal Tax Aspects of Charitable Giving
- Introduction to Canadian Income Tax
- Ways to Give - Assets Other Than Cash
- Deferred Gifts - Tax Aspects
- What a Successful Plan Looks like



Understanding the Charitable Sector

Obtain a deeper knowledge of emerging philanthropic and fundraising trends. Learn to guide clients' giving objectives towards the investment options and charitable structures that ensure gifts will be used wisely and according to their wishes.

This course provides foundational knowledge for navigating and assessing the charitable landscape. Students will be equipped to provide guidance when evaluating giving

Six modules cover:

- The Charitable Sector Landscape
- Emerging Philanthropic Trends
- How Charities Operate
- Funding of Canadian Charities
- Legal and Ethical Considerations
- Planning for Impact



Integrating Gift Planning

Obtain a deep, broad knowledge of how to apply gift planning vehicles to the objectives of various client profiles. Learn how to stay onside with ethical and legal considerations in doing so. Using true-to-life case studies, the student will learn to anticipate how to help clients maximize their gifts and make impactful gifts while minimizing the costs of giving.

Six Modules cover:

- Multi-Stakeholder Planning
- Working with Vulnerable Clients
- Guaranteed 10 Pay Insurance Gift
- Legacy Planning for Business Owners
- Donation of Existing Life Insurance Policy
- Using FTS to Lower the After-Tax Cost of Charitable Donations
- Using Insurance to Make a Major Gift
- Using the CPP for Philanthropy

RE-CERTIFICATION REQUIREMENTS

Your license to use the MFA-P™ marks must be annually renewed to meet Standards of Conduct and continuing education requirements (15 hours each year). There are no membership fees. For details on options for re-certification starting in 2020, please visit www.knowledgebureau.com

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FREQUENTLY ASKED QUESTIONS ABOUT THE MFA-P™ PHILANTHROPY DESIGNATION

FOR WHOM IS THE MFA-P™ PROGRAM DESIGNED?

The MFA-P™ Philanthropy Designation program is designed for advisors looking to incorporate charitable giving into their client conversations. This includes financial advisors, investment advisors, life insurance advisors, lawyers and accountants. It is also an important differentiator for advisors seeking prospective high-net worth clients. The MFA-P™ is also a valuable credential for those working in the charitable and non-profit sector.

Why should I enrol in the MFA-P™ program?

The MFA-P™ is designed to help advisors incorporate strategic charitable giving into their client conversations. There are many reasons to discuss philanthropy with your clients:

- Charitable giving is an important part of holistic financial planning, including estate planning.
- It is an opportunity to get to know your clients on a deeper level by understanding their values and an easy way to reach out to your clients' extended families including their children and grandchildren.
- You can help to structure charitable gifts in a simple but effective way and help your clients realize their philanthropic goals while maintaining the integrity of their investment, estate, and tax planning strategies.
- Advisors who connect family values and history as part of a long-term wealth management approach will be well-equipped to address increasing concerns clients have to make a difference in today's world of heightened social awareness.
- All professional advisors interviewed in a 2014 Canadian survey entitled The Philanthropic Conversation agreed that having incorporated philanthropy into their practice has strengthened and solidified their business. It is not only the right thing to do; it is unequivocally good for your clients and your practice.

What will the MFA-P™ program teach me to do?

The three online courses in the program focus on teaching advisors to develop plans with individuals and families looking to support their favourite charities in a strategic fashion, using a practical approach featuring real-life case studies and cutting edge calculators and a comprehensive online research library to stay up-to-date with tax changes.

I work at a charity. Is the MFA-P™ program for me?

The program will benefit those who work in the charitable and non-profit sector, as well as consultants and other individuals who support the sector. While designed for advisors, the MFA-P™ program will provide an understanding of charitable giving using a multi-stakeholder approach. The MFA-P™ designation will add credibility to those who cultivate relationships with both their clients and the professional advisors they work with.

How long will it take me to complete the MFA-P™ program?

Although the time will vary for each person, each course will take approximately 15-20 hours to complete for a total of 45-60 hours for the program. Taken online, study time is completely flexible to fit your busy schedule. Instructor support is available by email if needed. Take up to 9 months to complete the program. Group study sessions can be arranged.

Why choose the MFA-P™, in a nutshell?

- Provide unique and valuable service to your existing clients.
- Prospecting for new high net worth and charitable-minded clients.
- A powerful tool to transition your service to the next generation of your clients' families.

A Message from the Presidents

“Thank you for your interest in the MFA-P™, Master Financial Advisor - Philanthropy Designation Program. We want to make sure you make the right decision for your professional development. Feel free to participate in a free trial of the program environment and to schedule a personal consultation with the friendly educational consultants at Knowledge Bureau for help with your registration.”

Sincerely, Ruth MacKenzie, President & CEO, CAGP; Evelyn Jacks, President of Knowledge Bureau; Brad Offman, CEO, Spire Philanthropy

About CAGP

The Canadian Association of Gift Planners is the only organization in Canada that brings together charitable representatives with professional advisors in one association. Among our fundraising, tax, legal and financial peers, we are looked to as the experts in strategic charitable gift planning.

The 20 CAGP Chapters across the country are essential partners in achieving CAGP’s vision and mission, by building and leveraging local relationships and engaging members to strengthen philanthropy and strategic charitable gift planning. Comprised of and serving CAGP’s 1200+ members across the country, Chapters provide education and professional development designed for charitable gift planners, professional advisors and senior decision-makers, the opportunity to network and connect with their peers and colleagues at the local level is one of the most important and valuable benefits of membership in CAGP.

About Spire Philanthropy

At Spire Philanthropy, we offer an innovative approach to relationship building between corporations and charities. We work with a variety of public, private and not-for-profit organizations to build long-term, meaningful relationships that have a sustainable, lasting impact.

Our basic philosophy at Spire Philanthropy is to build stronger partnerships between the corporate and charitable sectors. In order to create these partnerships, a new paradigm must be created; one where both corporations and charities recognize value and benefit equally from it. The funder-receiver paradigm, where the power in the relationship rests with the corporations, undermines the very definition of partnership.

As corporations become more strategic with their community investments, and with charities trying to maximize their limited resources, we work with both parties to develop partnerships that create real value, both intrinsic and financial, for all.

About Knowledge Bureau

Knowledge Bureau™ is a widely respected, financial education institute and publisher. Our mission is to raise standards of practice by focusing on the evolving knowledge and skills required by professionals to manage their client’s wealth with tax efficiency. We do that by providing competency-based training leading to certification, diplomas and designations, with certification marks licensed annually to graduates who have attained specialized proficiencies and follow professional Standards of Conduct.

Founded by tax expert, award-winning financial educator and best-selling author, Evelyn Jacks in 2003, our world-class education solutions feature an academic approach to professional development in a multi-disciplinary framework. Knowledge Bureau is recognized by the CRA and Human Resources and Skills Development Canada. Tuition fees are tax deductible if over \$100.

Professionals may attain ongoing CE/CPD Credits, train staff or advance professional careers by demonstrating new skills in seven specialized fields. This includes the MFA™ (Master Financial Advisor) Designations, the MFA-P™ Philanthropy Designation, the Distinguished Financial Advisor™ Designations and the RWM™ (Real Wealth Manager) Designation.



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- Ruth MacKenzie,
President and CEO, CAGP

“All of our partners and faculty members have worked hard to develop a designation program that will be of particular value to advisors working with high net worth clients, as well as those who put social impact at the top of their investment priorities.”

- Evelyn Jacks
President of Knowledge Bureau

“I am looking forward to working with firms and advisors to engage in this important industry designation that will add further trust and credibility to the work of advisors, and impact on charities in Canada,”

- Brad Offman
CEO of Spire Philanthropy.