

# The Ways & Means of Planned Giving

Thursday, October 2, 2008  
12:00pm - 1:00pm

## PRESENTED BY



## SPEAKER

**DeWayne Osborne**  
**CGA, CFP,**  
Lawton Partners Financial  
Planning Services Ltd

## LOCATION

Volunteer Manitoba  
5 Donald Street South, 2nd floor  
FREE Visitor Parking

## FEE

\$10.00 Payment at the door  
Pre-Registration Mandatory  
Bring your own lunch  
Refreshments provided

## REGISTRATION

[www.volunteermanitoba.ca](http://www.volunteermanitoba.ca)  
fax: 204.284.5200  
toll free fax: 1.866.419.2606  
email: [vmregister@mts.net](mailto:vmregister@mts.net)

**Cancellation Policy:**  
Notice of cancellation must  
be received 7 days prior to  
the event. Any cancellations  
after this date will be subject  
to the full fee.

funded by:



## An overview of various planned giving options

Planned giving programs are outgrowing other forms of fundraising due to the aging population. You will learn of the various planned giving options available to your donors and the associated tax implications. This information will help you assist your donors to make planned gifts that benefit your organization while meeting their financial (and altruistic) needs and desires.

### Agenda:

- 11:45 Registration
- 12:00 Presentation
  - w Overview of planned giving options
  - w Discussion of tax implications of each option
- 12:45 Question & Answer Period

### Who Should Attend?

Executive Directors, Board Members,  
Fundraisers, Finance Officers, Fund  
Developers, Fundraising Committee  
Members

Name

Organization

Position

Email (IMPORTANT)

Address

City

Postal

Phone

Fax