



# Legacy Gift Planning Workshop: Diagramming the Elephant in the Room

February 15, 2012

West Harvest Inn, Regina SK

**CAGP • ACPDP™**  
CANADIAN ASSOCIATION OF GIFT PLANNERS  
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNÉES PLANIFIÉES

Saskatchewan South &  
Saskatchewan North Roundtables

## Itinerary

**8 - 9 AM**

**Registration & Breakfast**

**11:45 AM - 1 PM**

**Lunch**

**3:30 PM**

**Closing Remarks**

**Because of Saskatchewan's lovely winter weather, we hope to have you safely on your way by 4PM!**

## Speakers

### Opening Remarks

Judy Davis, Chair, CAGP South Saskatchewan RoundTable

### Build Relationships & Engage Donors with Social Media

Rob Maguire, Saskatchewan Jazz Festival Marketing Director

### Properly Designed Wills

Winifred (Wyn) Kanyogonya, Senior Will & Estate Planner,  
Scotia Private Client Group

### Minimizing Risk of Financial Abuse

Carolyn Decker, Saskatchewan Public Trustees Office

### Planning Paralysis

Patrick O'Connor, Founder & President Blackwood Wealth  
Planning

# About Our Speakers



## **Patrick O'Connor**

Pat is the President of Blackwood Wealth Planning. Pat and his firm utilize a disciplined planning process to assist their business-owner clients in dealing with the many complex financial planning issues they face. An outcome of this planning process is often a tactical action plan to coordinate and implement the many planning strategies a business owner needs such as shareholder agreement funding, investment strategies, insurance strategies, succession plan implementation, executive compensation, employee benefits, and retirement planning.



## **Winnifred (Wyn) Kanyogana**

Wyn joined the Saskatchewan Scotia Private Client Group Center in November 2011 and is responsible for providing advice and guidance to Estate and Trust clients for their Will and estate planning strategies.

She has been with the Scotiabank Group since 2008 and worked in the financial services industry for over 25 years. Past positions held within the Scotiabank group include Manager, Fiduciary Services and Scotiatrust Branch Manager, Calgary.

Wyn obtained her Bachelor of Commerce degree, specializing in Finance from the University of Toronto. In addition to this, she holds the Canadian Investment Manager, the fellow of the Canadian Securities Institute and Trust and Estate Practitioner designations. Memberships include the Society of Trust and Estate Practitioners (STEP).

# About Our Speakers



## **Rob Maguire**

Rob Maguire is an arts marketer and nonprofit communications consultant. He is the Marketing & Sponsorship Director at the Saskatchewan Jazz Festival, where he has grown the organization's brand and audience through social media and word of mouth marketing.

Rob is also the founder and editor of Art Threat, an online magazine dedicated to politically-engaged art and cultural policy, and serves on the board of the Broadway Theatre, a historic community arts centre in Saskatoon.

Contact him at [rob@robmaguire.com](mailto:rob@robmaguire.com).



## **Carolyn Decker**

Born and raised in Saskatchewan, Carolyn Decker has held the position of Legal Counsel for the Public Guardian and Trustee of Saskatchewan since December 2005.

Over the course of her career, she has specialized in general civil litigation, debtor-creditor law, and estates litigation, including dealing with guardianship applications. Her current practice includes working with clients to minimize their risk of financial abuse.

Carolyn is a Member of the Canadian Bar Association.

# Event Sponsors



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## What's with the Elephant?

*Estate Planning* is a conversation that we all need to have with our families, financial planners, brokers, lawyers and favorite charities. However, it can sometimes seem like an elephant in the room! We're here to help you understand this animal and maybe even help it fit a little better into your space!

Join the cool kids by registering at: <http://ow.ly/8yAdJ>

Tweet with us @CAGPRegina event hashtag #GiftPlanSK