

"Donor Motivation: Leveraging the Impact of Gifts"

A Panel Discussion featuring Wayne Chiu, Barb Fallis, Tom Jackson and Tony Myers, M.A., LL.B., CFRE moderated by Hal Button, CFP, RFP, TEP

The decision for a donor to make a charitable gift to a charity can be deeply personal. We know, as fundraisers, to be truly donor-centred, we want to understand donor interest and passions so we can help them connect with our cause and help them match their gifts to their values. We have the privilege of hearing first hand from four community-minded donors about their own motivations for supporting charity, how they choose the charities they support and who they consult for advice when making their philanthropic decisions.



- Session:** "Donor Motivation: Leveraging the Impact of Gifts"
 A Panel Discussion moderated by Hal Button, featuring Wayne Chiu, Barb Fallis, Tom Jackson and Tony Myers
- Date:** Thursday, February 12, 2009
- Time:** (Luncheon) 11:30am – 1:00pm
- Location:** Fort Calgary, 750 - 9th Avenue SE, Calgary (FREE Parking)
- Cost:** CAGP/AFP Members \$30.00 / Future CAGP/AFP Members \$45.00

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https://afpcalgary.afpnet.org/educational_lunch_programs.aspx

Registration deadline is Friday, February 6, 2009

About the Presenters:

Wayne Chiu



Wayne is the Founder and President of Trico Developments Corporation (est. 1989) and Trico Homes Inc. (est. 1993). He is a Mechanical Engineering graduate from the University of Manitoba and a qualified master builder. In the first year of operation, Trico Homes built twelve single family homes. Over the past decade, Trico Homes has continued to grow and develop, having built over 4,500 single and multi-family homes in the Calgary area.

Trico Homes has also been honoured as one of "Canada's 50 Best Managed Companies" and as one of the "Best Workplaces in Canada". Wayne has been recognized as an "Immigrant of Distinction" and was awarded the "Generosity of Spirit Award" by the Association of Fundraising Professionals for his philanthropic work within the community.

Barb Fallis



Barb worked for RBC Financial Group for 36 years before retiring in July 2006. During that time she held a variety of roles including Human Resources training, Branch Manager of several branches and for the final five years as Sales Manager for a team of Financial Planners. Barb has been involved with The Calgary Learning Centre for 20 years beginning as a one on one adult tutor and is now completing her final year on the board sitting as Past Chair. The Calgary Learning Centre deals with children and adults with learning difficulties by helping them to learn and improve their reading and writing skills. Barb is an avid reader which is what drew her to the literacy cause. Other passions include golf and travel and Barb has spent the past 2+ years since retirement doing a lot of both of those things!Life is good!

Tom Jackson



While Tom is well known to Canadians as an accomplished musician and actor, his dedication to helping the less fortunate has thrust him into the limelight as a philanthropist and proponent of humanity and social change.

Tom has been recognized for his music and humanitarian work in various ways including being Appointed an Officer of the Order of Canada (2000), awarded the Canadian Academy of Recording Arts and Sciences (CARAS) Humanitarian Award (2007 Junos), The Academy of Canadian Cinema & Television Humanitarian Award (2007 Geminis), Queen's Jubilee medal (2002) and Centennial Medals (Alberta and Saskatchewan in 2005). Time Magazine named him one of Canada's best activists and the Universities of Alberta, Laurentian, Winnipeg, Victoria, Trent, Lakehead, Calgary and Lethbridge have conferred Honorary Degrees upon him.

Born on the One Arrow reserve in Saskatchewan and raised in Winnipeg, Tom left school at the age of 15 and spent seven years living on the back streets of Winnipeg. This experience built the foundation of his character - tenacity, leadership, determination to succeed and an altruistic capacity to care for others.

Tom's humanitarian work centres on using his natural gifts to bring awareness to important social issues. These issues include suicide in Aboriginal communities (*Dreamcatcher Tour*), hunger (*Singing for Supper* and *Swinging for Supper Tours*) and various initiatives centering on hope (*The Vigil*, a post-9/11 concert fundraiser held September 12, 2001 raising money for humanitarian aid through the Red Cross), relief (Say Hay an Alberta event that raised \$1.8M for drought-stricken prairie farmers) and entire communities in economic crisis (Beef Relief in aid of cattle ranchers devastated by border closures). Moved by increasing issues surrounding global food insecurity and homelessness, Tom's next foray is elevating the quality of life for Canadians through the manufacturing of affordable housing.

J.A. (Tony) Myers, M.A., LL.B., CFRE



Tony is the principal and senior counsel with Myers & Associates, an international fundraising consultancy based in Calgary.

Tony advises organizations on matters and strategies surrounding major donor fundraising, major campaigns, organizational review and strategic planning, and development, but his real passion is in helping organizations access significant gifts from high net worth individuals.

His clients range from some of the highest profile organizations internationally to some of the smallest and most relevant locally. As the Advisor to the President (Strategic Initiatives) at the University of Calgary (one of Canada's largest research intensive universities) from 2004 - 2008, Tony provided leadership in developing strategic partnerships with business, industry and government.

Tony's experience in developing sustainable fundraising plans has met with real success in numerous organizations. Drawn by his experience in setting up three charitable foundations across Canada, and his work in major donor fundraising, Tony has been sought after as a speaker on numerous topics related to his work, at national and international conferences over the past 20 years. Tony brings a passionate and committed perspective to his work in the support of philanthropy and giving.

Facilitator

Hal Button, CFP, RFP, TEP



Hal Button is Director, Philanthropy with The Family OfficeTM. Hal started in 1979 as an insurance broker for Standard Life Insurance working for the same manager his father had worked for years before. Hal had been brought up understanding the importance of planning and insuring for the future, a passion he, in turn, has passed on to his son.

Since Hal's entry into the world of financial planning, he has achieved the highest designations available in the area of Professional Financial Planning, the CFP (Certified Financial Planner) and the RFP (Registered Financial Planner). In recognition of Hal's expertise in the area of Estate and Philanthropic Planning, he has earned the internationally recognized TEP (Trust and Estate Practitioner) designation.

Hal has had a great deal of experience both as an advisor to philanthropists and as a philanthropist himself. In 2002, Hal found himself suffering from a lack of philanthropic direction and donor fatigue – he was not able to see the results of his giving because it was without direction and he was spread too thin.

In 2002, Hal spent a pivotal weekend at a three-day course provided by the Canadian Association of Gift Planners. Here, he learned the plight of charities that were experiencing funding cuts, mission drift, employee fatigue and suffering withdrawal as the government was getting out of the business of funding charities.

Hal went on to earn his Trust Estate Practitioner designation and began studying the gaps that existed between donors, charities, professional advisors and government. Hal now focuses his time on helping individuals with a philanthropic interest and providing non-profit organizations with professional guidance. Hal has since become one of Calgary's best-known champions of corporate philanthropy. He consistently advocates for legislative changes that will enhance the tax and financial benefits of charitable giving.

Hal has challenged corporate Calgary to give more and to recognize that corporate social responsibility is more than a catch phrase; it is the responsibility of a compassionate organization and member of a greater community. In the past three years, The Family OfficeTM has raised more than 10 million dollars for Calgary and area charities.

Hal now works with a myriad of charitable organizations to improve their fundraising efforts, helping them become strategic, long-term planners. Hal personally supports several Calgary not-for-profit organizations by lending knowledge, experience and elbow grease to their causes.

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