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CAGP-ACPDTM DEFINITION OF GIFT PLANNING:

Gift Planning is the donor-centered process of planning charitable gifts, whether current or future gifts, that meets philanthropic goals and balances personal, family, and tax considerations.

A NOTE FROM THE EXECUTIVE DIRECTOR

Happy New Year!

As we close off our 2008 files and move into 2009, I am most aware of this phrase we use so often throughout this month – *Happy New Year*. For the first time in my tenure at CAGP-ACPDTM, I feel the most driven to make 2009 a good year. There will certainly be more challenges – much of them the same issues that many CAGP-ACPDTM members are experiencing. The recession is touching us all and yet, we are seeing when one door closes – another opens.

For instance, while some financials advisors are having difficult conversations, mortgage brokers are experiencing increased business. While some forms of giving are down – we are seeing some communities increase their support of their foodbanks and homeless shelters. From what I have seen - I think Canadians truly want to help. Thank you to all the stories we received recently on how the economy was affecting your organization. What struck me the most about these stories was how apologetic our major donors were – how sorry they were to not be able to make their usual annual donation. To view a summary of these donor stories, please visit the *Members-Only Section*, under *Gift Planning Tools/Advocacy*.

What's up for CAGP-ACPDTM for 2009?

I feel there is no other time than this year to increase CAGP-ACPDTM visibility to stakeholders and government - along with increasing our LEAVE A LEGACYTM messaging to the public. To that end, in December we sent some of our member stories to Imagine Canada to include in their meeting with government officials. On January 5th we participated in the public letter to the Prime Minister and other government leaders proposing three specific measures which should



be included in the upcoming budget to stimulate greater private sector funding for charities:

1. Exempt gifts of private company shares from capital gains taxes
2. Exempt gifts of real estate from capital gains taxes
3. Level the playing field between "arms length" and "non-arms length" employees who exercise stock options and give the shares to a charity within 30 days.

The federal budget is being tabled on January 27th, 2009 and so there was some timing issues surrounding our ability to get our messaging out. However, we are hopeful that enabling some of these new measures will encourage new giving in Canada. To view the details of this letter to government leaders, please visit the *Members-Only Section*, under *Gift Planning Tools/Advocacy*.

Our visibility with stakeholders will also include building partnerships with various Advisor groups to encourage participation of more advisors in planning gifts. And our LEAVE A LEGACY™ materials and website will increase awareness this year. Already we are receiving many orders for brochures enabling this consistent messaging and branding in many communities throughout Canada. We are also hopeful to introduce a national PSA in May ...stay tuned!

In 2009, we will be introducing new partners that have specific services and products to support your gift planning work. Our most recent partner offering was introduced in December - *GEORGE'S TREE* – a unique gift planning tool created by CAGP-ACPDPTM member - Alain Levesque from DeVimy Group Inc. *GEORGE'S TREE* – is an animated story of a well-planned gift. But it is much more than a story. The book allows for input and discussion with donors/clients with examples - where calculations can be made directly in the book.

In 2009, we plan to announce several new upcoming member benefits including:

1. special member pricing on new Canadian research,
2. on-line gift planning calculation tool
3. webinars with CE credits

I look forward to working closely with CAGP-ACPDPTM members as we continue to promote, plan and educate the world of gift planning in 2009. That one planned gift can save a charity - saving a charitable mission. That's what keeps me motivated.

All the best for 2009!

Diane MacDonald
Executive Director

UPDATE FROM THE CAGP-ACPDTM NATIONAL BOARD

CAGP 2008 Membership Survey Results

First of all, many thanks to everyone who answered our survey (there were some 270 of you)! We achieved a 20% response rate!

Your National Board of Directors met in Ottawa at the beginning of November and one of our tasks was to review this survey in detail so we can make sure CAGP-ACPDTM is serving it's members.

As we've said before we are a Governance Board and as such we evaluate our Executive Director, Diane MacDonald on seven outcomes. We listed these outcomes in our Member Survey and asked our members to rate and comment on each in terms of being relevant to them.

The preponderance of survey respondents listed all the outcomes as top priorities. The exception was Outcome #1 (We have a membership of 3,000 members by 2013). That is, the preponderance of survey respondents listed Outcome #1 as a 2 on a priority scale of 5.

Outcome #1

We have a membership of 3,000 members by 2013.

Trend and challenges that our members thought would affect this outcome:

- 22 responses felt more charities are becoming members of CAGP-ACPDTM
- 14 said demographics (aging population) would demand more information on estate planning and CAGP-ACPDTM had a role in that education
- 10 felt our membership benefits are a driver for increased membership
- 7 felt that gift planners needed to be more aware of tax incentives
- 13 people thought this target was too ambitious (how many gift planners do we need anyway?)
- Some felt the cost of membership is prohibitive for small charities

Board Reflections:

We should offer more educational offerings and continue to forge new organizational partnerships.

Round Tables should continue to be involved with regional growth

Outcome #2

CAGP-ACPDTM is rebranded as the leading gift planning organization in Canada.

Trend and challenges that our members thought would affect this outcome:



- Most responses were very positive
- Most commented we do have a niche in the fundraising world (LEAVE A LEGACY™ is our brand)
- We are different than AFP and need to articulate our unique strengths
- We need to focus on what we do well
- We have a great reputation and we should be marketing more
- We should be seeking more partnerships with other organizations
- A few didn't like the word rebranding

Board Reflections:

We will spend a significant amount of time at our June 2009 retreat considering the needs of our various stakeholder groups and how our Outcomes and branding relate to these groups.

Outcome #3

Gift planning is professionalized through competency-based standards of practice.

Trend and challenges that our members thought would affect this outcome:

- Most of our members who responded felt this was important
- There was some confusion between certification and accreditation
- There are a number of designations in the industry (how would we begin to harmonize or develop these options?)

Board Reflections:

It is clear that CAGP-ACPDPTM plays a significant role in enhancing the education of people engaged in the gift planning profession.

We want CAGP-ACPDPTM to continue to develop and implement the best model for gift planning education.

Outcome #4

There are four new educational offerings.

Trend and challenges that our members thought would affect this outcome:

- The comments were sincere and concerned
- Educational sessions are very much appreciated and fill a need
- CAGP-ACPDPTM could explore how to partner with community colleges and other organizations on the Canadian Gift Planning Course, etc.
- A portion of the course could be offered on line lower costs for the participants
- The Advanced Gift Planning Course is a good idea and necessary there were some concerns of the costs, location and course content

Board Reflections:

We want to promote quality and excellence in Planned Giving education

Outcome #5

80% of our members report excellence in networking opportunities.

Trend and challenges that our members thought would affect this outcome:

- people need and want networking
- more people are entering the field and these new people need this networking
- networking is most effective when it builds on our existing programs
- Some of our challenges are: travel costs, poor local organization, quality of sessions, too busy to attend

Board Reflections:

We see the value of offering significant networking opportunities at our events

Outcome #6

CAGP-ACPDTM is instrumental in new legislation being passed concerning Charitable Remainder Trusts and gifts of real estate.

Trend and challenges that our members thought would affect this outcome:

- Education on CRT's is an issue (people do not know what role CAGP-ACPDTM plays)
- Should we be pushing the CRT's?
- Are they a useful or a proper focus?
- Education vs. advocacy? (what is our role?)

Board Reflections:

We will continue to play a prominent role.

Outcome #7

There are at least four positive national media reports about gift planning per year.

Trend and challenges that our members thought would affect this outcome:

- There is greater interest in philanthropy in general and this is reflected in greater media focus on gift planning.
- Leave a Legacy publications have been a significant part of our success.

Board Reflections:

Diane and CAGP-ACPDTM volunteers have done very well in getting us in the national media in the last several years.

Summary Comments:

Profile of our membership that is engaged in planned giving:



- Small and large charities,
- Full-time and part-time
- Very diverse roles
- Financial advisors

Profession of gift planners or people engaged in gift planning who are our stakeholders? The board will be focusing increasingly on the stakeholders of CAGP, their needs and how the organization's goals should align to the various groups. Some of the stakeholder groups identified included the following:

- Fundraisers with major focus on gift planning
- Fundraisers with portion of time spent on gift planning
- Fundraisers with a managerial and/or supervisor capacity who don't necessarily see themselves as gift planners
- Professional advisors with focus on gift planning
- Educators
- General public
- Media
- CRA

Thanks again to the respondents. Next year, when we send out our new survey, please take a few minutes. Remember, we are your Board of Directors and we are listening!

Article submitted by: Tom Riglar

CAGP-ACPDTM Exhibits at a Financial Advisor Forum

For the first time in CAGP-ACPDTM history, the National office took an exhibit booth at an Advisor Financial Forum. From January 15-17, Anne Williams, Membership Coordinator, and Jennifer Paradis, LEAVE A LEGACYTM Coordinator, participated in the Toronto Financial Forum & Wealth Management Expo - Canada's premier financial event where exhibitors, investors and advisors meet to develop new business-building relationships; exchange ideas; discover new products and services. Approximately 10,000 delegates were in attendance. About half of the attendees were high wealth individuals and the other half were financial advisors.

The staff participated in this Forum with the following three main objectives:

- To provide awareness of LEAVE A LEGACYTM
- To provide awareness of CAGP-ACPDTM
- To recruit membership and encourage attendees to explore CAGP-ACPDTM educational opportunities.

They feel they were successful with all three objectives and will be reporting on these outcomes over the next few months. Their booth was very busy, very popular and a lot of interest was generated around gift planning. After speaking to so many delegates over the 3

days, they found there were some common thoughts being repeated to them from advisors. Their findings were:

- Many advisors had never heard of CAGP-ACPDTM and were inquiring how long we've been around (1992)
- Advisors were wondering why CAGP-ACPDTM was not involved with the Estate Planning Council. (Most Roundtables are involved locally. There is no national Estate Planning body that we are aware of.)
- Advisors indicated that many clients were beginning to ask them about planned giving and they were unsure how to handle their requests. Advisors indicated that they were sending them to the charities to discuss further.
- Advisors felt they were constantly being targeted by charities for endorsement of their charity.
- Some advisors felt that the charity took over the discussion and that they were not to be included in the discussion.

Overall the Forum was a great success with many delegates leaving with a better understanding of charitable planned giving. We learned that CAGP-ACPDTM has a lot more work to do in getting our name out there. But we are encouraged to know that many advisors were excited to hear that we exist and that there is a place to learn more and to connect with charities. Thank you to Great-West Life, London Life and Canada Life for their support in this first-time project. We hope to plan more of these initiatives in 2009. For suggestions and comments, please contact leavealegacy@cagp-acpdp.org.



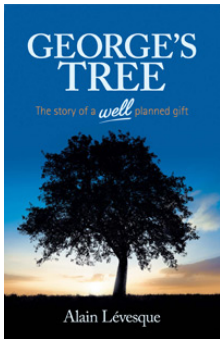
QUOTE OF THE MONTH

One never notices what has been done; one can only see what remains to be done.

-- Madame Curie



GEORGE'S TREE - The Story of a Well Planned Gift



GEORGE'S TREE, The Story of a well planned gift is an animated story of a well-planned gift. But it is much more than a story. The book allows for input and discussion with donors/clients with examples.

Specialist in gift planning, Alain Lévesque demystifies many preconceived notions on the subject of philanthropy. Through George's story he clearly reveals, with the help of precise and easily understood examples, various ways to make charitable donations.

100% of the profits from this book will be donated to organizations coming to the aid of children.

Special 15% CAGP-ACPDTM Member discount off the regular rate!

To place your order please click [here](#).

CAGP-ACPDTM NATIONAL EDUCATION UPDATE

2009 at a Glance!

CAGP-ACPD has an exciting line up of educational opportunities for 2009. They are:

1. Original Gift Planning Course scheduled for March 3 – 8, 2009 Banff , AB
2. Annual Conference scheduled for April 22 – 24, 2009 – Niagara Falls, ON
3. Original Gift Planning Course scheduled for May 12 – 17, 2009 – Woodview, ON
4. ADVANCED Gift Planning Course scheduled for September 22 – 27, 2009, Whistler, BC
5. Original Gift Planning Course scheduled for October 20 - 25, 2009 – Banff, AB

***New* - Pre-Conference Session - Tuesday April 21/09 - Intro to Gift Planning - All in a Day!**

8:00 a.m. to 6:00 p.m. Breakfast, lunch, breaks and reception included. **Faculty: Brian Shea**, Alberta Cancer Foundation and **Joshua Thorne**, Hamilton Foundation.

Are you new to gift planning and looking to learn about the basics? Or, would you like a "refresher" - to review all the concepts and tools before you attend the more detailed workshops at the Conference? This year, we invite you to a full day of pre-conference learning and networking. You will begin the day by reviewing Canadian trends and tax issues, move into a review of the most common gifts in Canada and conclude with marketing, stewardship and donor recognition. To end the day, you will attend a reception with your new-found colleagues enabling you to compare notes and share even more new ideas. All in a day!

2009 CAGP • ACPDP™ FRIENDS Award – Deadline February 13, 2009

Do you know someone who should be recognized for their contribution and dedication to the vision of CAGP • ACPDP™ and Planned Giving?

Each year, CAGP-ACPDP™ recognizes individuals who, and organizations which, exemplify the spirit and vision of CAGP-ACPDP™. Those who receive this honor and recognition are presented with the “Friend of CAGP • Ami(e) de l’ACPDP” award at our Annual National Conference.

If you would like to nominate someone who you feel deserves this award, please click [here](#) to download a nomination form.

For more information on any of these problems please contact Sharyon Smith at 1-888-430-9494 or education@cagp-acpdp.org



Generosity Index

In December 2008, *The Fraser Institute* released their annual Generosity Index. This Index measures the private monetary generosity using two indicators, 1) the percentage of tax filers who donated to charities (i.e., the extent of generosity), and 2) the percentage of aggregate personal incomes donated to charity (i.e., the depth of generosity). Please find below the main conclusions of the Index.

- The provinces with the highest percentage of tax filers who donated to charity during the 2006 tax year are Manitoba (28.1%) and Ontario (26.7%). The province with the lowest percentage of tax filers who donated to charity is Newfoundland & Labrador (21.6%).
- The provinces that donated the highest percentage of aggregate income to charity during the 2006 tax year are Manitoba (1.14%) and Ontario (0.92%). The province that donated the lowest percentage of its aggregate income to charity is Quebec (0.33%).
- Though the extent of charitable giving fell in almost every Canadian province from 1996–2006, the percentage of aggregate personal income donated in Canada has increased.
- A higher percentage of tax filers donated to charity in the United States (29.7%) compared to Canada (24.7%) during the 2006 tax year. Similarly, Americans gave a



higher percentage of their aggregate income to charity than Canadians, at 1.66% and 0.76%, respectively.

- The extent of generosity varies significantly among US states and Canadian provinces and territories. Only Manitoba, Canada's top-ranked province, falls into the top half of sub-national donators among all provinces, territories, and states during the 2006 tax year.
- In terms of the percentage of aggregate income donated, Canadian provinces and territories fall behind every US state except for North Dakota, South Dakota, Alaska, and West Virginia during the 2006 tax year.
- US jurisdictions top the Generosity Index rankings. Utah places first (8.8 out of 10.0), followed by Maryland (7.6 out of 10.0) and Washington, DC (6.5 out of 10.0). The highest-scoring Canadian province is Manitoba (3.9 out of 10.0), but its performance ranks only 37th overall out of 64 North American jurisdictions. The three Canadian territories rank at the bottom of the list.

To read the full report, please use the following link:

http://www.fraserinstitute.org/commerce.web/product_files/Generosity_Index_2008.pdf

For more information on LEAVE A LEGACY™, please contact Jennifer Paradis, National LEAVE A LEGACY™ Coordinator at leavealegacy@cagp-acpdp.org or 1-888-430-9494 x 3.



STRONGER COMMUNITIES TOGETHER™

CRA NEWS

- 2009-01-12
[The Canada Revenue Agency revokes the charitable status of The Millennium Charitable Foundation](#)
- 2009-01-12
[CRA revokes the registered status of Little League Baseball Canada](#)
- 2009-01-02
[Government helps Canadians maximize their savings with the new Tax-Free Savings Account](#)

Gift Planning: Harnessing the Power



Workshop Session Sign Up Is Now Available!

Now when you register online for the 16th Annual National CAGP-ACPDTM Conference, you can choose your workshop sessions!

For more information click [here](#).

To register online click [here](#).

To download a printable registration form click [here](#).

To download a Workshop Session Sign up form click [here](#).

To download a Toolbox Lunch Session Sign Up form click [here](#).

Sheraton on the Falls, Niagara Falls, Ontario

Visit us on the web at <http://www.cagp-acpdp.org/en/education/conf09.aspx>

CAREER CORNER

Campaign Director, Capital Campaign Telus World Of Science For more information click here .	Posted: 01/06/2009 End: 01/23/2009 Location: Calgary, AB
Development Officer Greater Niagara General Hospital Foundation For more information click here .	Posted: 01/15/2009 End: 02/14/2009 Location: Niagara Falls, ON

Visit www.cagp-acpdp.org for more job postings. For rates and services, click on [Post a Job](#).



A WARM WELCOME TO THE FOLLOWING MEMBERS WHO ARE NEW TO CAGP-ACPDTM OR HAVE RETURNED FROM A BRIEF PERIOD AWAY

First Name	Last Name	Business Organization	RoundTable
Crystal	Aboud-Mahar	Cape Breton University	Nova Scotia
Alicia	Arcangeletti	Hospice Niagara	Niagara/Golden Horseshoe
Joel	Attis	AttisCorp Financial Group, Inc.	Saint John
Craig	Bishop	Scotia Private Client Group	Newfoundland
Kevin	Cahill	Cahill Financial Services	Waterloo-Wellington
Lucie	Châtelain	Ottawa Regional Cancer Foundation	Ottawa
Marvin	Cohen	Stable Financial Services Inc.	Niagara/Golden Horseshoe
Alanna	Holroyd	The Allen & Loreen Vandekerkhove Family Foundation	Vancouver Island
Elaine	Kelly	Meridian Credit Union	Greater Toronto
Susan	Law	Easter Seals Alberta	Southern Alberta
Basya	Laye	Jewish Community Foundation of Greater Vancouver	Greater Vancouver
Paula	MacNeil	Cape Breton University	Nova Scotia
Brian	McCallum	Etherington & Vukets	Greater Toronto
Donna	McLennan	Rick Hansen Foundation	Greater Vancouver
Andrea	McManus	The Development Group	Southern Alberta
Don	Ohlgren	ShelterBox Canada	Vancouver Island
John	Phin		Southern Alberta
John	Pin	T.D. Waterhouse - Private Trust	Greater Vancouver
Keith	Pond	The Toronto Symphony Orchestra	Greater Toronto
Maurice	Prevost	University of Ottawa	Ottawa
Karyn	Racher	VON South Central Ontario Foundation	Niagara/Golden Horseshoe
Paul	Spelliscy	Variety - The Children's Charity	Greater Vancouver
Mary	Townson	Easter Seals Alberta	Southern Alberta

UPCOMING EVENTS

<p>1/29/2009 View more information</p>	<p>Nova Scotia RoundTable</p> <p>Effective Use of Volunteers and Boards in Gift Planning</p> <p>Guest Speaker: Bob Edgett</p>
<p>2/5/2009 View more information</p>	<p>Ottawa RoundTable</p> <p>Advance Yourself</p> <p>Guest Speakers: Rosalie Courage, Peter Nicholson, Allan Wong, Rowena Griffiths, Karen J. Cooper</p>
<p>2/12/2009 View more information</p>	<p>Southern Alberta RoundTable</p> <p>What Motivates Donors?</p> <p>Joint Luncheon with AFP</p>
<p>2/19/2009 View more information</p>	<p>Greater Toronto Area RoundTable</p> <p>Major Gifts and Planned Giving Integration</p> <p>Guest Speaker:Hallie McClelland</p>

For more information on CAGP-ACPDTM and other events visit:
<http://www.cagp-acpdp.org/en/membership/events.aspx>
To have your event posted, email your event information to rtsupport@cagp-acpdp.org