

In this Issue

- A NOTE FROM THE EXECUTIVE DIRECTOR
- 2009 NATIONAL CONFERENCE NEWS
- BOARD OF DIRECTORS UPDATE
- CAGP-ACPD™ 2008 MEMBERSHIP SURVEY RESULTS
- CRA NEWS
- EDUCATION REPORT
- LEAVE A LEGACY™
- 2009 CONFERENCE
- CAREER CORNER
- WELCOME NEW MEMBERS
- UPCOMING EVENTS 2009

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The Planner is published regularly throughout the year by The Canadian Association of Gift Planners™. Reproduction of articles may not be carried out without permission of the Association. The Planner is available in English and French.

For more information please contact:
 CAGP-ACPD™
 Head Office:
 325 Dalhousie
 Suite 201
 Ottawa, Canada
 K1N 7G2
 1-888-430-9494
 Fax (613) 232-7286

March 2009 VOL 18 NUMBER 3

CAGP-ACPD™ 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

March 2009

Report from the Executive Director

This month I want to take a few minutes to talk about integrated marketing. As I take the time to get to know our membership through the course, conference and RT visits, I see that there is more we can do to assist members in promoting planning a gift to their supporters and potential supporters.

I think CAGP took a big step in this direction this year by providing new LEAVE A LEGACY™ tools. Members now have brochures, note pads, pins, pens and other items to promote this nationally branded message. We also have text that they can use from our LEAVE A LEGACY™ website such as: *How to Give, Getting Started, Giving Options, Why your will is important and the Top Ten Things you Can Do Today to Leave a Legacy.*

What about your own communications?

Marketing doesn't have to be expensive, difficult, or complex. It can be done successfully in a highly ethical, respectful manner. At the very least, CAGP members should have an Overview Or "Ways of Giving" brochures. We recommend that they include the following information:

- Case statement of charity – fundamental mission, not current priorities
- One or two paragraphs surrounding some of the more common vehicles i.e bequests, stocks.
- Invitation for more details information



- Include the LEAVE A LEGACY™ logo in your material (membership benefit)
- Response mechanism (postage paid)
- Privacy policy (sealed envelopes and privacy statements)
- Disclaimer

Where would you use this brochure?

- Direct Mail – can be used for a targeted mailing and/or solicitation to selected prospects.
- Include in other mail-outs. Include samples articles on gifts at work, donor profiles, tax tips, charity facts, Heritage society news.
- The best results will be achieved when the letters are followed up with phone calls and visits.
- Post your brochure on your website.

Have you considered your marketing opportunities?

Maybe start with your charity's "immediate family" such as: current and former volunteers, faculty – current and retired, trustees and board members, committed long-time donors, and event sponsors. Your external opportunities could be: ticket subscribers, patients/alumni, congregations, facility users, program participants, professional advisors, and community philanthropists etc.

At CAGP, we know two things:

- A large portion of gifts will come out of the blue, from people who are not in your donor base or on any mailing list. Depending on the charity and the maturity of the gift planning program, up to 80% of bequests can come from unknown donors.
- Many gifts will come from people who have given small amounts to your organization, are lapsed donors, or have given infrequently.

So our advice is to continue planting the seed, spreading the message and participating in your local LEAVE A LEGACY™ program – a brand that is becoming more and more prevalent across Canada. As a member you have the right to use the LEAVE A LEGACY™ logo. For more information, contact leavealegacy@cagp-acpdp.org or visit www.leavealegacy.ca for marketing content.

Diane MacDonald
Executive Director



A NEW ADVERTISING OPPORTUNITY FOR CAGP-ACDPD™ MEMBERS!

CAGP-ACDPD™ has chosen to partner with Charity Times magazine because it is the only national publication of its kind - dedicated to both the non-profit sector and Canada's donating public. Published six times per year, Charity Times magazine will provide a valuable communication service by keeping readers engaged and informed about the latest news and trends affecting the non-profit sector. Circulation of this magazine will include 30,000 affluent Canadian donors who will personally receive this magazine in their mailboxes in April.

SPACE FOR SPACE

By placing an ad in the first edition of Charity Times magazine, CAGP-ACDPD™ members will receive **a matching advertising opportunity** for a second advertisement any time in any of the upcoming editions this year. The deadline for this offer is **March 30th, 2009**.

Take advantage of the space for space deal or get 50% the rate card price. Pricing begins at \$2,320.00. To view the Charity Times Media Guide, please [click here](#).

For more information on the magazine, please visit www.charitytimesmagazine.ca or contact:
Joe Plati, Publisher
Tel: 1-905-851-6800
Email: jplati@charitytimesmagazine.ca.

2009 NATIONAL CONFERENCE NEWS

The Early Bird Deadline for the 2009 16th Annual National CAGP-ACDPD™ Conference, has been extended to match the hotel deadline. You have until March 16th to take advantage of the Early Bird price for this years conference in Niagara Falls, ON.

[Click here](#) to register now!



Click on the image to access the full 2009 Conference program

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

Sheraton on the Falls, Niagara Falls, Ontario Visit us on the web at <http://www.cagp-acdpd.org/en/education/conf09.aspx>



UPDATE FROM THE CAGP-ACPDTM NATIONAL BOARD

The Fun part of Conference - Networking

As April hurtles towards us like the gush of water over the Falls, you've registered for conference, so now all you have to do is plan your networking opportunities in between your educational sessions. The National Program Committee, chaired by Michelle Osborne, University of Toronto and Conference Host Advisory Committee, chaired by Mary Kay Aird, United Way of Burlington & Greater Hamilton have both excelled in assisting our National Office staff in pulling together an educational and entertaining program.

Starting on Wednesday evening this, is a summary of networking opportunities to look for. You won't want to miss any of the plenary speakers and now you just have to make a note of where to "see and be seen"!

Welcome Reception at 5 pm Wednesday evening. Meet the many exhibitors and sponsors who are so important to our profession. You never know who else you might meet there too.

The Refreshment Breaks during the program are held in the Exhibit Area, so head back there during the day and chances are you'll find the person you want to connect with.

AGM and Toolbox lunch on Thursday at 12:15 is a necessary and an important accounting to you, of the state of the Association, hotly followed by the Toolbox lunch. You picked your topic when you registered. I wonder who else will be at my table?

CAGP-ACPD Reception and Banquet - Thursday 6 pm, with guest Gord Paynter - Leave 'Em Laffin. This event is always well attended and the volume of conversation reflects the excitement coming from so many energized gift planners! This is where you can wear your party regalia. The Friend of CAGP-ACPAD Award recipient is announced at this event, so be sure to rally your peers around your nomination and celebrate whoever is the winner!

Friday night dinner - if you signed up for this you'll be heading up the Skylon Tower for a spectacular view of the Falls and beyond. What a way to end the 16th Annual CAGP-ACPD National Conference with old friends and hopefully some new ones too.

Throughout the conference your Association Board members will be easily identifiable and ready to welcome you. See you in April at The Falls.

PS If you haven't registered...there is still time.

Board Member
Charlotte Lawson.

CAGP-ACPDTM 2008 MEMBERSHIP SURVEY RESULTS

CAGP-ACPDTM 2008 Membership Survey Results Module Two Membership Benefits

This particular Module of the October 2008 Member survey provides insights into which existing services are important to members of the CAGP-ACPDTM and how relevant respondents consider potential upcoming benefits to their CAGP-ACPDTM membership in the following years. Overall, **315 respondents** participated in the survey.



We asked respondents six (6) questions surrounding membership benefits at the CAGP-ACPDTM to be able to better understand what current services are most used by our members and what other services our members would like the opportunity to use. Though we had a total of 315 respondents to the entire survey, the following section was not mandatory to answer, thus the number of responses varies.

Relevance of Membership Benefits

The first question put to members was the relevance of twelve current benefits to their CAGP-ACPDTM membership. Respondents rated each benefit's relevance as **High, Moderate or Low**. The item of most relevance, according to our 293 respondents was Government tax information with sixty percent high relevance rating. This is followed by Networking locally with fifty-eight percent high relevance rating. The third highest ranked benefit was Local RoundTable Educational events at fifty-seven percent high relevance.

At the other end of the spectrum, the lowest rated benefit was Job Posting services with thirty-six percent, followed by the Ask an Advisor button with thirty-two percent low relevance rating. The third lowest ranked benefit was sharing best practices through the CAGP website forum coming in at thirty-one percent.

HIGHEST RELEVANCE

- Government tax information **(60%)**
- Networking locally **(58%)**
- Local RoundTable Educational events **(57%)**
- New Partner – Planned Giving for Canadians e-book **(54%)**
- National educational events – conference, course etc. **(53%)**

LOWEST RELEVANCE

- Job Posting services **(36%)**
- Ask an Advisor button on new CAGP website **(32%)**
- Sharing best practices through the CAGP website forum **(31%)**
- Continuing education credits **(30%)**
- LEAVE A LEGACYTM **(23%)**

Use of Membership Benefits

These same respondents were then asked how often they made use of the listed membership benefits. Respondents answered whether they used the benefit **Very Often, Sometimes** or **Not at all**. Membership benefits respondents made the most use of included Local RoundTable educational events, Networking and Government tax information. According to the 293 respondents, most have never made use of the Ask the Advisor button on the new CAGP-ACPDTM website, Opportunities to volunteer or Continuing education credits.

Future Benefits

CAGP-ACPDTM is considering providing various new benefits in the upcoming years through our membership. We asked respondents how relevant these potential upcoming benefits would be to their CAGP-ACPDTM membership. Again respondents were asked to rank each potential benefit by rating of **High, Moderate** or **Low** relevance. The top three highest rated benefits were Marketing ideas, techniques and sample materials (67% High rating); Recent statistics on Gift Planning in Canada (59% High rating) and Valuing gift intentions, gift planning strategy (52% High rating). Coming in at a close fourth was Package PowerPoint for presentations for Boards and stakeholders (49% High rating). These percentages were in



alignment with the 2007 Member Survey. 'Advocis credits' was ranked as having low relevance by 59% of respondents.

The last three questions of the Membership Benefits module shifts toward the increases in membership benefits for the past two years; Membership Renewal plans and reasons why members may not be renewing their membership.

As the CAGP-ACPDTM grows, it is always important to receive feedback to help guide the Association in the right direction, to plan for the future and set goals for the Association. Sixty-six percent of 293 respondents said that they have noticed the increase in benefits in the last two years. This has increased by 10% since the 2007 Member Survey. Twelve percent said that they have not noticed an increase and the remaining twenty percent could not comment as the majority of those who chose that option have been a member of CAGP-ACPDTM for less than a year.

Of the 293 members who responded to the last question of the Membership Module, ninety-six percent of respondents plan on renewing their CAGP-ACPDTM membership. Of those who answered no to renewing, this open-ended question allowed for a variety of answers ranging from the most frequent responses such as; retiring soon; maternity leave and budget constraints, etc. to less frequent replies such as; "going back to school" and "I have decided not to pursue this field."

The next module, *Education*, profiled in next month's Planner, will provide valuable information for the National Office regarding the importance of learning opportunities – those that exist and those that are yet to exist.

QUOTE OF THE MONTH

Mahatma Gandhi once said, "I shall pass through this world but once. Any good therefore that I can do or any kindness that I can show to any human being, let me do it now. Let me not defer or neglect it, for I shall not pass this way again." Thank you for the good that you do for our community through your charitable endeavors.

CRA NEWS

- 2009-02-18
[Mr. Jean-Pierre Blackburn, the Minister of National Revenue, launches the call for proposals for the charitable sector](#)
- 2009-02-20
[Charities Outreach and Partnership Program](#)



CAGP-ACPDTM NATIONAL EDUCATION UPDATE

ADVANCED Canadian Gift Planning Course – Registration Opening April 17th!

September 22 – 27, 2009
Whistler, British Columbia

Description

Due to popular demand, CAGP-ACPDTM is pleased to offer for the second time, one of its newest additions to its Educational offerings – The ADVANCED Canadian Gift Planning course. The ADVANCED Canadian Gift Planning course is designed for seasoned gift planners and professional advisors. The course is technical in nature and addresses gift planning techniques, charity law, and advanced practice issues. Interactive and in-depth, the course provides a unique opportunity to explore the issues with experienced professionals.

Content

ADVANCED Canadian Gift Planning course is an intensive immersion in the tax and philanthropic issues related to charitable giving. It balances technical knowledge and practical issues related to building a gift planning practice. All the major Canadian gift planning techniques and issues are covered in detail, with a particular emphasis on planning issues for high-net worth donors, such as donor advised funds and private foundations. The course provides a comprehensive overview of the charitable sector, addressing types of registered charity, the Canadian regulatory system, tax shelters, and international giving. Special content has been added to address charitable planning strategies for recessionary times.

The small class size and high level of experience of the participants promotes vigorous debate and excellent opportunities for peer learning in case studies and group work. The retreat mountain setting encourages thoughtful discussion, group interaction, and time to enjoy the mountains (for those who are interested). It is also a rare opportunity for professional advisors and charity professionals to explore the issues and motivations related on both sides of the gift planning process.

Professional advisors will particularly appreciate learn about how to talk to your clients about their philanthropic goals, as well as learn about new giving techniques and opportunities to focus and grow their business.

Whether you are a professional advisors or a gift planner within a charity - this course will deepen your knowledge of charitable gift planning in Canada.



Who Should Attend

- Professional advisors, such as lawyers, accountants, financial advisors, insurance advisors
- Experienced gift planners, especially those with 2 to 5 years of practice; graduates of CAGP-ACPDTM's Gift Planning Course.

The Course Leaders

This course was developed and will be taught by Malcolm Burrows and Susan Manwaring. Malcolm Burrows is Head, Philanthropic Advisory Services, Scotia Private Client Group, Executive Office. Susan Manwaring is Partner, Miller Thomson LLP.

Tuition and Accommodation: we are pleased to keep our tuition fees in line with our 2007 course allowing a moderate increase for related courses expenses. For budgeting purposes you can assume registration for Members at \$1350, nonmember \$1550; hotel accommodation including all meals approx. \$260. per person per night. *These are approximates and will be confirmed shortly.

We expect this course to fill quickly, if you wish to be placed on an "Interested Participants" list please advise Sharyon at education@cagp-acpdp.org. By being on this list you will receive advance notice and the opportunity to register before the general public.

Original Canadian Gift Planning Course – Registration now Open! [Click here](#)

1. **May 12 – 17, 2009**
Viamede Conference Resort and Spa
Woodview, Ontario

Book this date - **May 12-14, 2010**, Edmonton, Alberta for the 17th Annual National CAGP-ACPDTM Conference
Please contact Sharyon Smith at education@cagp-acpdp.org if you have any questions regarding this session.



LEAVE A LEGACY™

LEAVE A LEGACY™ is pleased to announce an additional benefit for all professional advisors CAGP-ACPDTM members!

Effective February 27th, the recently re-vamped LEAVE A LEGACY™ website, leavealegacy.ca, launched a "Find an Advisor" search option for the general public. As a CAGP-ACPDTM



professional advisor member, your name, business and contact information has been included in this public directory – accessible from the homepage of the website!

This new feature will not only give CAGP-ACPDPTM advisors more exposure, but will also enable the public to search through the CAGP-ACPDPTM advisor directory for an appropriate advisor in their area – one that abides by our Code of Ethics.

We would like to encourage all our professional advisors to visit the directory, www.leavealegacy.ca/program/help/, and verify that your contact information is up-to-date. If it is not, please contact Jennifer Paradis, National LEAVE A LEGACY™ Coordinator at 1-888-430-9494 ext 3, or by email, leavealegacy@cagp-acpdp.org.

Even in tough times, Canadians are still contributing to their favourite charitable organizations. Below you will find a few 'Tips' that you may want to consider giving as a hand-out to donors and/or supporters to ensure they are making the most of their contributions.

Tips for Making the Most of Your Charitable Contributions

- 1. Plan for giving.** Plan your philanthropic activities right into your budget just as you would other financial obligations.
- 2. Keep the right records.** For gifts of less than \$250, a cashed check or receipt from the charitable organization is sufficient proof of contribution. For donating property, establishing a trust or an annuity, talk to your accountant.
- 3. Be aware of how much is really tax-deductible.** If you receive a premium in exchange for your gift (such as a book or a dinner), the amount of your tax deduction is reduced by the fair market value of the premium. You can turn down the incentive item if you wish to claim a deduction for the full amount of your gift. Ask the receiving organization for more details.
- 4. Ask about matching gifts.** Many employers match gifts made by their employees or make grants to organizations recommended by employees. Be sure to ask your company how it can help your gift go even further.
- 5. Remember your gift can be confidential.** If you prefer to have your gift remain confidential, you can expect the charitable organization to honor your request.
- 6. Consider alternative forms of giving.** Don't overlook the benefits to you and your cause received from bequests, charitable gift annuities, gifts in kind, endowments and many other creative forms of giving. Ask your tax advisor or attorney to help you make the best plan for you and your family.
- 7. Volunteer. In addition to financial support, consider giving your time and skills.** Not only will you help the organization, but you'll also make contacts, gain experience, and learn more about the charitable cause to which you're committing your time and money.



8. Be a proactive giver. You don't have to wait to be asked. Plan a giving strategy in advance. Contact the charitable organizations of your choice to discuss how your gifts can be most effectively used and help make a difference in your community.

Website: http://www.independentsector.org/Nonprofit_Information_Center/wisegiving2.html

LEAVE A LEGACY™ is a public awareness program of the CAGP-ACPD™. This program provides CAGP-ACPD™ members with tools and tips such as this article – to assist in planning gifts with your donors or clients. 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™

CAREER CORNER

<p>Manager of Philanthropy West Park Healthcare Centre</p>  <p>For more information click here.</p>	<p>Posted: 02/19/2009 End: 03/16/2009 Location: Toronto, ON</p>
<p>Manager, Planned Giving The Richmond Hospital Foundation</p>  <p>For more information click here.</p>	<p>Posted: 02/23/2009 End: 03/23/2009 Location: Richmond, BC</p>
<p>Manager, Alumni Relations and Annual Fund The University of Ottawa</p>  <p>For more information click here.</p>	<p>Posted: 02/23/2009 End: 03/25/2009 Location: Ottawa, ON</p>
<p>President & Chief Executive Officer The Canadian Medical Foundation</p>  <p>For more information click here</p>	<p>Location: Ottawa, ON</p>



<p>Senior Development Officer The Heart & Stroke Foundation of Ontario</p>  <p>HEART & STROKE FOUNDATION OF ONTARIO <i>Finding answers. For life.</i></p> <p>For more information click here</p>	<p>Location: Toronto, ON</p>
<p>Chief Executive Officer Heart & Stroke Foundation of Nova Scotia</p>  <p>HEART & STROKE FOUNDATION OF NOVA SCOTIA <i>Finding answers. For life.</i></p> <p>For more information click here</p>	<p>Location: Halifax, NS</p>
<p>Fund Development Manager Alberta Ecotrust</p>  <p>alberta ecotrust ...because it's our home.</p> <p>For more information click here</p>	<p>Location: Calgary, AB Ends: 03/06/2009. Position will remain open until a suitable candidate is found.</p>

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
Guylaine	Beaudoin	Fondation du Collège Laflèche	Quebec
Anne	Brayley	Toronto Community Foundation	Ontario
Jay	Brodbar	New Israel Fund of Canada	Ontario
Aaryn	Bryant	The Salvation Army	Alberta
Monica	Carlberg	University of Manitoba	Manitoba
Roberto	Cesario	Investors Group Financial Services Inc.	Ontario
Catherine	Collver	University of Victoria	British Columbia
Nicolas	Courval-Côté	Mouvement Desjardins	Quebec
Kathryn	De Carlo	Canadian Cancer Society	Ontario
Calvin	Fong	Vancity Community Foundation	British Columbia
Kari	Frazer	Habitat for Humanity Victoria	British Columbia
Deborah	Glassman	Stella Burry Foundation	NFLD and Labrador
Jan	Guerin	Stollery Children's Hospital Foundation	Alberta



Vicki	Hayter	Fanshawe Collge	Ontario
Richard	Horbachewski	SAIT	Alberta
Nena	Jocic Andrejevic	University of Alberta	Alberta
Alison	Keys	Keys Direct Marketing & Communications	Ontario
Diane	Kon	Niagara Child and Youth Services Foundation	Ontario
Sari	LaBelle	RBR Development Associates Ltd.	New Brunswick
Nancy	Langlois	Desjardins	Quebec
Cecily	Lawrenson	United Way of the Lower Mainland	British Columbia
Bonnie	Megley	Royal Alexandra Hospital Foundation	Alberta
Anne	Ohlgren	Shelterbox Canada	British Columbia
Harold	Penner	Mennonite Foundation of Canada	Manitoba
Robert	Rogers	Canadian Hemochromatosis Society	British Columbia
Jyotsana	Saha	McMaster University	Ontario
Lori	Sussman	Canadian Diabetes Association	Ontario
Heather	Travis	United Way of the Lower Mainland	British Columbia
Erin	Walter		Alberta
Frances	Ward	Benefaction Foundation	Ontario
Corina	Weigl	Fasken Martineau Du Moulin LLP	Ontario
Amanda	Williams	West Island Palliative Care Residence	Quebec
Carrie	Zeffiro	Niagara Child and Youth Services Foundation	Ontario

CAGP-ACPDTM UPCOMING EVENTS

3/17/2009 View more information	Greater Vancouver RoundTable Donor Advised Funds Joint Meeting with Fraser Valley Estate Planning Council Guest Speaker: Christopher Richardson
3/18/2009 View more information	Montreal RoundTable La levée de fonds dans un monde d'incertitudes et d'ambiguités" par Monsieur Jean Lessard *En Français Seulement*
3/19/2009 View more information	Greater Toronto RoundTable Capacity Issues and Talking to Seniors Guest Speaker: Jasmine Sweatman



<p>3/20/2009</p> <p>View more information</p>	<p>London RoundTable</p> <p>Marketing Planned Gifts: Overcoming Internal & External Challenges</p> <p>Guest Speaker: Helen DeBoer</p>
<p>3/31/2009</p> <p>View more information</p>	<p>Niagara/Golden Horseshoe RoundTable</p> <p>Joint Luncheon with AFP Donor Panel</p> <p>Guest Speaker: TBA</p>
<p>04/02/2009</p> <p>View more information</p>	<p>London RoundTable</p> <p>Power of Philanthropy Conference</p> <p>Guest Speaker: Dr. David Posen and Frank O'Dea</p>
<p>04/06/2009</p> <p>View more information</p>	<p>Southern Alberta RoundTable</p> <p>Charitable Gift Planning 101 Spring 2009 An opportunity for development professionals to learn the basics about planned giving.</p>