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## April 2009 VOL 19 NUMBER 4

### 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 April 2009

Last month I had the pleasure of observing the CAGP-ACPD™ Original Gift Planning Course held in Banff. I use the word "pleasure" because it was indeed a wonderful week. Every time I attend the course, it reaffirms for me what CAGP-ACPD™ is all about. Gift Planning is a unique body of knowledge and CAGP-ACPD™ is the one place where you can find all there is to know about the planning gifts in Canada. And witnessing the immense learning and sharing that takes place in that room - confirms that this body of knowledge is important to ensure that gift planning remains a priority for charities and advisors for many years.

### What did the participants learn?

Not only were the participants put through the paces of reviewing the details of all the more common gifts, but they were forced to put those new concepts into plans by the end of the week. They also shared marketing tips, learned where their organization is in their "readiness" for gift planning, received templates on how to incorporate gift planning in many areas of their work and their organization, discussed ethical issues and walked away with ideas they could begin with as soon as they got back to the office. In fact, one gentleman told me that he confirmed two planned gifts the following week just by applying some of the new techniques he learned at the course!

When asked what they would do when they returned to work, some participants said:

*"I feel confident that I will be able to formulate beneficial policies and procedures to set up an effective gift planning program."*

*"Better informed choices and processes for prospective planned giving donors; share this information with staff in my department for a holistic approach to planned giving"*

*"Now that we are more equipped, we will review the planned giving program in the office and make changes in our program structure and materials."*



### Our faculty

The participants were fortunate to have two excellent faculties teaching the course: Brad Offman (Mackenzie Financial Corporation) and Helen DeBoer (Norfolk General Hospital Foundation). Brad was insistent that the attendees have a fun and positive learning environment and ensured that every participant understood the concepts of each gift. Helen shared her experience and stories on the “softer” side of gift planning –engaging the class in exploring steps that they can take within their organizations to encourage planned gifts through new marketing techniques, new dialogue and new processes. All in all – an amazing week! But don’t take it from me – here is what some of our attendees had to say:

*“This course took our charity from nothing to up and running with knowledgeable training”*

*“Learning the technical aspects of gift planning has allowed me to be more confident in suggesting gift options to prospective donors. Learning from a professional who shares information in a concise and easy to understand format, made it even better. I would recommend this course to all gift planners, whether new to the field or a seasoned professional - you will certainly leave with more knowledge and greater confidence in your skills than you did walking in.”*

*“This course was a fantastic way to get new ideas, network with several fundraising organizations from across Canada, learn about gift planning vehicles, and learn how to write and implement your own Planned Gift Program in your own office.”*

*“This is has been the best experience of professional development I have ever had.”*

Have a wonderful month of April!  
Diane MacDonald

## 2009 NATIONAL CONFERENCE NEWS

**Are you unable to attend the entire 16<sup>th</sup> Annual National Conference?  
We have a variety of attendance options to suit your needs  
including:**

**[One day sessions on Wednesday, Thursday or Friday](#)**

**[Introduction to Gift Planning- All in a Day!](#)**

**[Gift Planning for Professional Advisors Session](#)**

[Click here](#) to register now!



Click on the image to access the full 2009 Conference program.  
To download a printable registration form, click [here](#).



## UPDATE FROM THE CAGP-ACPDPTM NATIONAL BOARD

### Conversations with Your Donors

As we navigate through uncertain economic times it is important to remember to have conversations with your donors regarding the impact they are experiencing. Many donors are concerned that they may not be able to give the annual gift they normally contribute to charities. This is a **critical time** for you to be in touch with them to provide reassurance to them that charities are aware of the challenging times we currently face.

Donors may need more time to be able to pay their pledges and may need to look at **stretching** out their payments. This is a time when Gift Planning becomes a very key way to assist donors.

A powerful solution for donors can be to **restructure** their current giving and plan to include future gifts through planned giving. These conversations deepen our relationships with our donors and promote positive stewardship.

As part of your membership, CAGP-ACPDPTM provides a plethora of resources that can assist you in working with donors. These include:  
*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 - where calculations can be made directly in the book.

*2008 Planned Giving for Canadians* is an integral part of CAGP-ACPDPTM Membership. Many members of CAGP-ACPDPTM have relied on the book since it was first introduced in 1997 and can now access the revised version. This book has always been a very important resource for gift planners in Canada. Dr. Minton created the book *Planned Giving for Canadians* back in 1997 and to this day it remains one of the single main resources for CAGP-ACPDPTM members.

*Ask an Advisor* is available to members to support them in creating new solutions for donors. For a full listing of the available resources, please go to <http://www.cagp-acpdp.org/en/membership/benefits.aspx>

The CAGP-ACPDPTM, since its inception, has focused on providing resources to the members to support their work with donors. Currently, Gift Planning can provide positive opportunities for you to have conversations with your donors.

Marilyn Monson, Board Member



## QUOTE OF THE MONTH

"What we do for ourselves dies with us. What we do for others and the world remains and is immortal."

-Albert Pine

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## CRA NEWS

### **2009 Canadian Federal Budget:**

<http://www.budget.gc.ca/2009/pdf/budget-planbugetaire-eng.pdf>

### **Canadian Charity Information Return for 2009, new T3010B:**

<http://www.cra-arc.gc.ca/E/pub/tg/t4033a/t4033a-07e.pdf>

### **Canada Not-for-Profit Corporations Act (Bill C-4)**

<http://www.parl.gc.ca/LEGISINFO/index.asp?Language=E&query=5653&Session=22&List=toc>

*It is with great sadness that we advise you Kathleen Therese Moriarty (O'Connor) has passed away March 26, 2009. Some of you may remember Kathleen as she was previously involved with the CAGP-ACPCP™ National Board as well as local RoundTables.*

*E-mail condolences may be directed to her family here:*

[condolences.snow@ns.aliantzinc.ca](mailto:condolences.snow@ns.aliantzinc.ca)



## CAGP-ACPD<sup>TM</sup> NATIONAL EDUCATION UPDATE

### Original Canadian Gift Planning Course

May 12 – 17, 2009

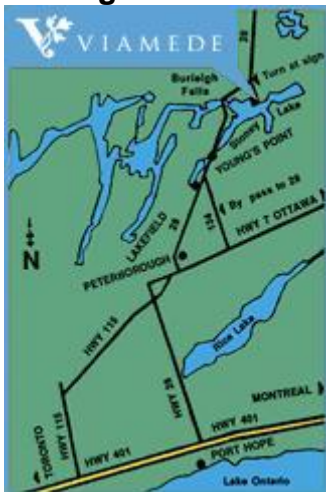
Viamede Conference and Resort (Woodview), Ontario.



Time is running out to register for this course! We can accommodate a maximum of 44 attendees only. **Don't delay**- please click [here](#) for full and further registration details!

Experience this course on the wonderful shores of Stoney Lake at the Viamede Conference Centre. This Conference Centre has sat on the shores of Stoney Lake watching the seasons change around her since 1870, undergoing many changes itself. Throughout the years, "the Grand Lady" of Stoney Lake has been home to many travelers and visitors. These surroundings will set the tone for a very challenging and productive week.

### Getting to the Viamede Conference Centre



#### From Toronto (approximately 2 hours)

Hwy. 401 east to Hwy. 115 north to Peterborough  
Hwy. 7 east to Hwy. 134/28 north to Hwy. 28  
north 5 miles past Burleigh Falls to  
Mount Julian-Viamede Road  
turn right 1.5 miles to the resort



**From Ottawa (approximately 3 hours)**

Hwy. 7 west to Hwy 134/28 north to Hwy. 28  
north 5 miles past Burleigh Falls to  
Mount Julian-Viamede Road  
turn right 1.5 miles to the resort

For further information please contact Sharyon Smith at [education@capp-acpdp.org](mailto:education@capp-acpdp.org) or 613-232-7991, Ext. 2

**Registration Opening April 17th**

**ADVANCED Canadian Gift Planning Course**

**September 22 – 27, 2009**

**Whistler Village Delta Suites Hotel, British Columbia**



Book this date - May 12-14, 2010, Edmonton, Alberta

**The 17<sup>th</sup> CAGP-ACPDPTM Annual National Conference**

Please contact Sharyon Smith at [education@cagp-acpdp.org](mailto:education@cagp-acpdp.org) if you have any questions regarding this session.



**LEAVE A LEGACY™**

**GET INVOLVED!**

**HELP CELEBRATE LEAVE A LEGACY™ MONTH – MAY 2009**

May is quickly approaching and many of your LEAVE A LEGACY™ Committees are gearing up for their annual Month of May activities. With new ideas and initiatives having surfaced over the last year, these events are expected to draw much needed attention to our very important message....*Make a Difference in the Lives that Follow.* Help celebrate LEAVE A LEGACY™ Month by volunteering at the event in your community!

**May LEAVE A LEGACY™ Events**

<p><b>Windsor LEAVE A LEGACY™ Committee</b></p>	<p><b>May 6, 2009</b> Now More Than Ever: Legacy Giving in Extraordinary Times Ambassador Golf Club</p>
<p><b>New Brunswick LEAVE A LEGACY™ Committee</b></p>	<p><b>May 13, 2009</b> LEAVE A LEGACY™ Seminar New Brunswick Museum</p>



<b>London LEAVE A LEGACY™ Committee</b>	<b>May 15, 2009</b> Story of my Life: Donor Panel London Club
<b>Greater Vancouver LEAVE A LEGACY™ Committee</b>	<b>May 20, 2009</b> Public Forum – What Estate Planning Can Offer You Morgan Creek Golf Club
<b>Newfoundland LEAVE A LEGACY™ Committee</b>	<b>May 21, 2009</b> LEAVE A LEGACY™ Breakfast The Fluvarium
<b>Alberta South (Calgary) LEAVE A LEGACY™ Committee</b>	<b>May 23, 2009</b> Legacy Seminar Series, Free Public Seminars: Wills, Estates, and End-of-Life Issues Mount Royal College
<b>Greater Vancouver LEAVE A LEGACY™ Committee</b>	<b>May 28, 2009</b> Public Forum – What Estate Planning Can Offer You H.R. MacMillan Space Centre Auditorium

If you are interested in volunteering for an event or would like more information, please visit <http://www.leavealegacy.ca/program/help/locate-a-program/> to contact the LEAVE A LEGACY™ Committee Chair near you.

For more information on LEAVE A LEGACY™, please visit [www.leavealegacy.ca](http://www.leavealegacy.ca) or contact Jennifer Paradis, National LEAVE A LEGACY™ Coordinator at [leavealegacy@cagp-acpdp.org](mailto:leavealegacy@cagp-acpdp.org), 1-888-430-9494 x 3.



**STRONGER COMMUNITIES TOGETHER™**



## CAREER CORNER

<p>Vice President, Public Policy and Outreach</p>  <p>For more information <a href="#">Click Here</a></p>	<p><b>Location:</b> Ottawa, ON</p>
<p>2 Positions Available: Development Officer, Planned Giving &amp; Coordinator, Planned Giving</p>  <p>For more information <a href="#">Click here</a></p>	<p><b>Posted:</b> 03/12/2009  <b>End:</b> 04/11/2009  <b>Location:</b> Vancouver, BC</p>
<p>Manager, Gift Planning</p>  <p>Canadian Red Cross          Croix-Rouge canadienne</p> <p>For more information <a href="#">Click here.</a></p>	<p><b>Posted:</b> 03/18/2009  <b>End:</b> 04/17/2009  <b>Location:</b> Victoria, BC</p>
<p>Manager, Gift Planning</p>  <p>Canadian Red Cross          Croix-Rouge canadienne</p> <p>For more information <a href="#">Click here</a></p>	<p><b>Posted:</b> 03/18/2009  <b>End:</b> 04/17/2009  <b>Location:</b> Alberta - Calgary or Edmonton Location</p>
<p>Fund Development Associate</p>  <p>For more information <a href="#">Click here</a></p>	<p><b>Posted:</b> 03/18/2009  <b>End:</b> 04/17/2009  <b>Location:</b> Central Alberta</p>

Visit [www.cagp-acpdp.org](http://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-ACDPD™ OR HAVE RETURNED FROM A BRIEF PERIOD AWAY

First Name	Last Name	Business Organization	RoundTable
Jennifer	Bakker	Colchester Regional Hospital Foundation	Nova Scotia
Yolanda	Benoit	Surrey Memorial Hospital Foundation	Greater Vancouver
Abe	Bergen	Canadian Mennonite University	Manitoba
John	Branton	Crohn's & Colitis Foundation of Canada	Greater Toronto
Jean-Pierre	Brunet	Fondation du CHUM	Greater Montreal
Benoît	Cardin	Archeveche de Montréal	Greater Montreal
Edna	Collins	St. Andrew's College	Greater Toronto
Mary Anne	Comuzzi	St. Joseph's Foundation of Thunder Bay	Greater Toronto
Roxanne	Côté	Distress Centre Calgary	Southern Alberta
Barbara	Dawson	Investors Group	Greater Toronto
Marie-Anne	Desjardins	Universite de Montréal	Greater Montreal
Jennifer	Diakiw	Heart & Stroke Foundation of Alberta, NWT & Nunavut	Southern Alberta
Randy	Diddams	Heart and Stroke Foundation of Alberta, NWT & Nunavut	Southern Alberta
Franca	Gucciardi	Canadian Merit Scholarship Foundation	Greater Toronto
John	Hochstadt	The Hilborn Group	Greater Toronto
Geraldine (Geri)	Johnston	Wesleyan Church of Canada	Ottawa
Tim	Jones	Rock Harbour Wealth Management Inc	Windsor and Essex County RoundTable
Katie	Loftus	David Suzuki Foundation	Greater Vancouver
Paula	McKinley	Heart and Stroke Foundation of New Brunswick	Saint John
Krista	Milliken	MacKenzie Art Gallery	Saskatchewan South
Andrea	Page	Stratford General Hospital Foundation	Niagara/Golden Horseshoe
Patricia	Phinney	The Salvation Army	London
Mark	Rittinger	Schulich School of Business	Greater Toronto
Edie	Smith	The Salvation Army	Southern Alberta
Lauren	Smith	The Lung Association	Niagara/Golden Horseshoe
Lori	Whitby	Northern Lakes College	Alberta North



## CAGP-ACPDPTM UPCOMING EVENTS

<p>04/02/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>London RoundTable</b>  <b>Power of Philanthropy Conference</b></p> <p align="center"><b>Guest Speaker:</b> Dr. David Posen and Frank O'Dea</p>
<p>04/06/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Southern Alberta RoundTable</b></p> <p align="center"><b>Charitable Gift Planning 101 Spring 2009</b>  <b>An opportunity for development professionals to learn the basics about planned giving.</b></p>
<p>04/14/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Saskatchewan South RoundTable</b></p> <p align="center"><b>Annual General Meeting Luncheon</b></p> <p align="center">April 14th, 2009  11:45am-1:15pm</p>
<p>04/22/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Join us at the 16th Annual National Canadian Association of Gift Planners Conference in Niagara Falls!</b></p> <p>The 16th Annual Canadian Association of Gift Planners (CAGP-ACPDPTM) Conference is an educational conference for gift planners, fundraisers and professional advisors. The CAGP-ACPDPTM is the only organization in Canada that brings together charitable representatives with donor advisors in one professional association, and is looked to as the experts in charitable gift planning.</p>
<p>04/28/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Greater Toronto Area RoundTable Lunch Education Session</b></p> <p align="center"><b>Economics and Retirement</b>  <b>With Dr. Sherry Cooper</b>  Tuesday April 28th, 2009</p>
<p>05/06/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Windsor-Essex RoundTable and LEAVE A LEGACY Event</b></p> <p>The CAGP-ACPDPTM Windsor-Essex RoundTable and LEAVE A LEGACYTM are launching LEAVE A LEGACYTM month with a kick-off event  <b>"Now More Than Ever: Legacy Giving in Extraordinary Times"</b></p> <p align="center">Wednesday May 6th, 2009</p>



<p>05/12/2009- 05/17/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Original Canadian Gift Planning Course</b></p> <p align="center"><b>Date:</b> May 12 – 17, 2009</p> <p align="center"><b>Where:</b> Viamede Conference and Resort (Woodview), Ontario.</p> <p>The Canadian Gift Planning course, CAGP-ACPD<sup>TM</sup>'s week-long course, is the longest running and most respected course on Canadian philanthropy. Founded in 1990, this demanding comprehensive course provides in-depth education on the full range of gift planning issues: from detailed information on the tax aspects of gift planning to topics such as working with donors, program marketing, stewardship, and ethics.</p>
<p>05/20/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Greater Vancouver RoundTable</b></p> <p align="center"><b>"Annual LEAVE A LEGACY<sup>TM</sup> Event"</b></p> <p align="center"><b>What Estate Planning Can Offer You</b></p> <p align="center"><b>Surrey BC</b></p>
<p>05/28/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Greater Vancouver RoundTable</b></p> <p align="center"><b>"Annual LEAVE A LEGACY<sup>TM</sup> Event"</b></p> <p align="center"><b>What Estate Planning Can Offer You</b></p> <p align="center"><b>Vancouver BC</b></p>
<p>06/03/2009</p> <p><a href="#">View more information</a></p>	<p align="center"><b>Manitoba RoundTable</b></p> <p align="center"><b>Alain Lévesque, President of DeVimy Group and author of <i>George's Tree: The story of a Well Planned Gift</i>. Alain is a specialist in gift planning.</b></p> <p align="center">Date: Wednesday June 3rd, 2009</p>

Please visit [www.cagp-acpdp.org](http://www.cagp-acpdp.org) for more information on upcoming events in your area.