



PLANNER

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CAGP-ACPDPTM 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

Report from the Executive Director

In keeping with the spirit of Christmas, I want to provide CAGP-ACPDPTM members with their Christmas wish list – the list that CAGP-ACPDPTM provides you:

1. A website filled with **on-line resources** –including: Planned Giving for Canadians, A Charitable Guide to Planned Giving and planforgifts.com.
 2. **Discounts** on educational offerings – including: The ORIGINAL Canadian Gift Planning Course, the CAGP-ACPDPTM Annual National Conference, local RoundTable educational offerings, and the new “Gift Planning - All in a Day”. **Discounts** on publications such as: “George’s Tree” and “Gift Planning in Canada”.
 3. **Support** through our “Ask an Advisor” Button, our RoundTable sessions and our Advisors listed in the CAGP-ACPDPTM Membership Directory.
 4. **Our message to Canadians** through LEAVEALEGACY.ca and through the local awareness efforts in 22 communities in Canada.
 5. **Networking** with members at local events, National events and on-line.
- Strong volunteer commitment** – both locally and nationally. This might not seem something the average member would put on their wish list. But without our volunteers, your member experience would not be close to what you have today. We encourage you to get involved – your member experience might be enhanced on many levels!

On our wish list for CAGP-ACPDPTM members this year, we have:

1. A new on-line product for calculating gifts – that is specially accessible for CAGP-ACPDPTM members.
 2. New initiatives with Professional Advisors.
 3. Engaging smaller charities with CAGP-ACPDPTM memberships.
- Introducing remote learning – enabling all members access to education regardless of location.

As you can see, these are big wishes! Know that CAGP-ACPDPTM will do their very best to deliver them to you in 2010.

What I know about our members is that you work very hard throughout the year and continue to support our efforts at CAGP-ACPDPTM. May you all have a peaceful holiday season and a well-deserved break. Happy Holidays!

Diane MacDonald
Executive Director



**Blessed is the
 season which
 engages the whole
 world in a
 conspiracy of love. -**

Hamilton Wright

Mabie

CRA NEWS

November 2010

- [Minister Blackburn launches call for proposals to benefit charitable organizations](#)
- [The registration for the November 2009 Charities Information Webinars is now open](#)
- [My Business Account \(MyBA\) service is now available for charities' accounts](#)

EDUCATION REPORT

Original Canadian Gift Planning Courses 2010:

March 23 – 28, 2010

Register Now!

Banff, Alberta

Faculty: Helen DeBoer-Daggett and Brad Offman

October 19 – 24, 2010

Banff, Alberta

Faculty: tba

If you would like to be on the “Interested Participants” list for the October course please contact Sharyon Smith at education@cagp-acpdp.org and receive your chance to receive updates on the session and the opportunity to register early!

2010 Annual Conference of CAGP-ACPDPTM May 12 – 14

Registration is now open! Plan on joining your friends and colleagues at the Festival of Dreams Conference in Edmonton, Alberta.

Register Now!

CAGP-CGA Series of Webinars

Please visit this site for the complete listing of webinars including the topics and dates. Please be advised this is a member benefit and CAGP-ACPDPTM members receive a registration discount by clicking “other”.

For more information on all CAGP-ACPDPTM Educational offerings, please click [here](#).

Gift Planning – All in a Day

The following RoundTables have expressed interest in hosting an All in a Day session in their area in the Spring: London, Waterloo, and downtown Toronto, stay tuned for more details.

We will also be offering the one day session in conjunction with the Annual Conference in Edmonton, May 2010.

CAGP-ACPDPTM
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIES

CONFERENCE 2010



The 17th Annual National CAGP-ACPDPTM Conference will be held in Edmonton, Alberta from May 12th-14th. This year's conference will be held at the Westin Edmonton.

Conference Preliminary Program is now available!



Register Now!

CAGP-ACPDPTM Special Member Offer

*Please click on the photo for more information

7th Annual
Foundation, Endowment & Not For Profit INVESTMENT Summit
Feb. 17 & 18, 2010 | Toronto, ON
Generate Income | Due Diligence
Meet Investment Objectives
Capital Preservation | Legal Issues
Disbursement Policy | Assess Risk
TAKE ADVANTAGE OF EARLY BIRD!



LEAVE A LEGACY™

Are you a Professional Advisor looking for information on charitable giving to give to clients?

Did you know that as part of your CAGP-ACPDP™ membership, you are able to order a LEAVE A LEGACY™ brochure that contains the information your clients are looking for when thinking of leaving a gift in their will? In partnership with our National Development Sponsor, Great West Life, London Life and Canada Life, we created this brochure to provide you, our Professional Advisor members, with general, unbiased, information about charitable planned giving and its importance.

This brochure outlines the following information:

- The best reasons to plan a gift;
- What is LEAVE A LEGACY™?
- How to get started;
- Common Questions;
- Planned Giving options;



Your CAGP-ACPDP™ member rate is \$0.20 per brochure (minimum order of 75). This brochure is available in both French and English. There is a blank space at the back of each brochure that allows for personalization.

If you would like to place an order, please download an Order Form [here](#).

Please contact Jennifer Paradis, National LEAVE A LEGACY™ Coordinator at leavealegacy@cagp-acpdp.org with any questions.



STRONGER COMMUNITIES TOGETHER™



CAREER CORNER



President and Chief Executive Officer **Posted:** November 5, 2009

Location: Toronto, ON



Please click [here](#) for more information.

Executive Director

Posted: November 5, 2009

Location: Winnipeg, MB



Please click [here](#) for more information

REPORT FROM THE BOARD

2010-2011 Board of Directors Nominations

Members of the Canadian Association of Gift Planners/L'association Canadienne des Professionnels en Dons Planifiés will elect the 2010-2011 Board of Directors as per Article 6 of the Association By-laws at the Annual General Meeting (AGM) of the Association to be held on Thursday, May 13th, 2010 in Edmonton, Alberta.

The 2009-2010 Board of Directors invites all interested Members in good standing to consider serving on the National Board of Directors. We are looking for strong strategic thinkers who are committed to moving our Association forward under the policy governance model.

Selection Process and Criteria:

The Association By-laws (Section 6.5) state that candidates for the office of Director may come from a slate of candidates recommended by a nominations committee appointed by the Board of Directors or formally nominated candidates.

To alert CAGP-ACPD members to the opportunity of becoming a Board Director, a call for expressions of interest in a Director position and for nominations was sent to the Membership from the National office on behalf of the Board of Directors in early December.

There are nine Board of Director positions in total. Four Board Directors are mid-term and will continue to serve on the Board until the 2011 AGM. Five new or returning Directors will be elected to the Board at the 2009-2010 AGM. (Continued...)



The following skills and attributes are considered when selecting candidates for the slate:

- demonstrated leadership ability
- service on a CAGP-ACPDPTM RoundTable or National Committee
- commitment to working with a policy governance model
- experience with a policy governance model a definite asset
- participation in CAGP-ACPDPTM activities and programs
- current member in good standing of CAGP-ACPDPTM
- professional knowledge and experience
- geographical, professional and sector diversity (including type of profession; size of community; and language usage).

Prior to recommending the slate of candidates, the Nominations Committee reviews the skills and attributes of the continuing Board Directors against the full list above to identify the type of characteristics desired for incoming Directors in order to build a strong and well rounded Board.

At its January 2010 meeting, the Board will approve the slate of Board Director Candidates. Following this meeting, the Nominations Committee will be in touch with all members who expressed interest in becoming a Board member to let them know whether or not they were successfully included on the slate.

Candidates are elected as new Board Directors by vote by the general membership at the AGM in May 2010.

Term:

As the bylaws reflect, the term of office of Director shall be one (1) or two (2) years. Directors may serve up to three consecutive terms on the Board.

Annual Time Commitment Required:

- Three to four, 1.5 hour teleconference calls per year.
- Three face-to-face meetings; at the annual conference, a weekend in June and a weekend in November.
- Time required to complete assigned projects or committee work.

Orientation and Training:

New Board Directors will participate in an orientation meeting to acquaint them with other Board members and their roles and responsibilities at a face-to-face meeting immediately following the Annual CAGP-ACPDPTM conference. A Board manual will be provided to new Directors at that time. (Continued...)



How to apply:

Members interested in serving on the National Board are invited to complete the expressions of interest form available on our web site at <http://www.cagp-acpdp.org/en/aboutus/directors.aspx> or from the National Office. To formally nominate a Member for election, the nominator and the nominee must complete the nomination section and follow all directions indicated in that section.

All expressions of interest or formal nominations must be received by January 15, 2010 at the following address:

CAGP-ACPDPTM
325 Dalhousie Street
Suite 201
Ottawa, ON K1N 7G2
Phone: (613) 232-7991
Fax: (613) 232-7286
Email: education@cagp-acpdp.org

For further information on Nominations, please contact Sharyon Smith (National Programs) 888-430-9494 or education@cagp-acpdp.org

Submitted by Marilyn Monson
CAGP-ACPDPTM Board Director.

ADDITIONAL INFORMATION

The Canadian Association of Gift Planners would like to congratulate **Janet Lawrence, a Gift Planner with The Salvation Army in Kelowna, BC**. Janet was the lucky winner of a digital camera for her participation in the 2009 CAGP-ACPDPTM members' survey.



Thank you for your participation, survey results coming soon!

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



Last Name	First Name	Business Organization	RoundTable
Béliveau	Claude	Béliveau & Ass Inc (Assurance Vie)	Greater Montreal
Cloutier	Todd	Great-West Life	Greater Toronto
Gagnon	Carole	United Way - Ottawa	Ottawa
Isberg	Janice	Fort St. John Hospital Foundation	Greater Vancouver
Kelly	Jeanette	Hospitals of Regina Foundation	Saskatchewan South
Ladouceur	Robert	PMA + GDM Cabinet de services financiers	Quebec City (l'est du Quebec)
Lafontaine	Pierre	U.Q.A.T. Foundation	Greater Montreal
Létourneau	Elyse	Fondation du CSSS de la Vieille-Capitale	Quebec City (l'est du Quebec)
Martens	Lise	Desjardins Financial Security	Ottawa
Matte	Nathalie	Leucan Inc.	Quebec City (l'est du Quebec)
McDonald	Melanie	Borden Ladner Gervais LLP	Souther Alberta
Munn	Debbie	Four Countries Health Services Foundation	London
Parker	Nancy	University of Windsor	Windsor and Essex County
Petricca	Rosanna	The Credit Valley Hospital Foundation	Greater Toronto
Remple	Ron	Canmore & Area Health Care Foundation	Southern Alberta
Sanson	Nathalie	Fondation Collège De Lévis	Quebec City (l'est du Quebec)
Spence	Terry	The Prostate Centre	Victoria
VanDerMeersch	Stephanie	Dundee Securities Corporation	London



UPCOMING EVENTS

Greater Vancouver RoundTable Holiday Social

Join us for our social mingler and share some holiday cheer with us!

Thursday, December 10, 2009

YWCA Vancouver

London RoundTable Event

Asking for Planned Gifts - Taking the fear out of the ask

Friday, January 8, 2010 from

Windermere Manor, London

Vancouver Island RoundTable Event

Planned Giving 101- Legacy Building

Thursday, January 21, 2009

University Club, University of Victoria

Greater Toronto RoundTable Event

Why Gift Planning Sessions Fail to Thrive

Thursday, January 21, 2010

Ryerson Business Building - Ted Rogers School of Management

Greater Vancouver Island LEAVE A LEGACY Library Series

LEAVE A LEGACY Library Series

Tax Planning & YOUR Wishes - Make it Work for Everyone

Tuesday, January 26 2010

Nellie McClung Branch, Greater Victoria Public Library