

CAGP

PLANNER

ACPD

February 2010

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A NOTE FROM THE EXECUTIVE DIRECTOR

On March 4th 2010, the 2010 Federal Budget will be announced and there are varying reports of what we will have in store for this year. Recently, a senior government official briefing reported that the government would run a \$34-billion deficit in the coming fiscal year and a \$30-billion deficit in the following year. It is expected that this new budget will include a plan to create a billion-dollar fund to help workers in hard-hit sectors such as forestry, agriculture and manufacturing. The Harper government is expected to pump more than \$2 billion into social housing across the country, a move that would help seniors, the disabled and aboriginal people. There also has been talk of strengthening the employment insurance system.

At the same time, Prime Minister Stephen Harper told reporters there would be some permanent tax measures that would be "modest" and "affordable in the long term."*

CAGP-ACPD™ is hopeful that the tax measures he refers to are the recommendations released by the Standing Committee on Finance on December 9, 2009 in their report entitled: A Prosperous and Sustainable Future for Canada: Needed Federal Actions." . This Report will be considered by the Ministry of Finance in drafting the upcoming 2010 federal budget.

The Committee recommended that:

The federal government examine incentives that would have the effect of increasing the level of charitable giving by businesses and individuals. In particular, the government should consider:

- **an increase in the charitable tax credit rate to 39% for incremental annual increases in giving, provided that annual giving is more than \$200 and less than \$10,000;**
- **the creation of a corporate structure for not-for-profit organizations that would allow the issuance of share capital and other securities; and**
- **the elimination of the capital gains tax on donations of real estate and land to public charities.**

Thank you to the CAGP-ACPD™ Government Relations Committee and all our members who participated in the letter writing efforts to their MPs and other government representatives. All we can do now is wait and hope that these recommendations move forward.

For further information on CAGP-ACPD™ Government Relations Committee activities, feel free to contact:

Diane MacDonald, Executive Director: diane@cagp-acpdp.org
Susan Manwaring, Chair, Government Relations Committee:
smanwaring@millerthomson.com

* Reference: <http://www.cbc.ca/canada/story/2009/01/25/budget.html>



QUOTE OF THE MONTH

The profit on a good action is to have done it.
Seneca

CRA NEWS

February 2010

- The registration for the February 2010 [Charities Information Webinars](#) is now open
- New Web page: [Gifts from other registered charities](#)
- News release: [Donations for victims of earthquake in Haiti](#)
- [Disaster relief - information for registered charities, donors, and applicants](#)

CAGP-ACPDPTM NATIONAL EDUCATION UPDATE

Original Canadian Gift Planning Course March 23 – 28, 2010 – Spaces still Available!!!

If you haven't registered to attend this Original Gift Planning Course, you might be dangerously close to missing out of the first big opportunity of the year to get your organization going in a positive direction for 2010! [Register](#) TODAY!

Fall session: October 19 – 24, 2010. Banff Alberta.

If you would like to be on the "Interested Participants" list for any of this session, please contact Sharyon Smith at education@cagp-acpdp.org for your chance to receive updates on the session and the opportunity to register early!

Gift Planning - All in a Day

Dates of confirmed sessions:

April 16, 2010 - [Windermere Manor Conference Centre](#), London, Ontario – Registration now Open!

May 11, 2010 - [Westin Edmonton](#), Edmonton Alberta

June 15, 2010 - [Ryerson University](#), Toronto Ontario

Please visit our [website](#) for further information as well as an Agenda for the day and registrations details.

2010 CAGP•ACPDPTM FRIENDS Award – Deadline February 12, 2010

Do you know someone who should be recognized for their contribution and dedication to the vision of CAGP•ACPDPTM and Planned Giving? Please take a few minutes now to nominate that rewarding person.



Each year, the CAGP-ACPDPTM Board of Directors recognizes individuals who, and organizations which, exemplify the spirit and vision of CAGP-ACPDPTM. Those who receive this honor and recognition are presented with the "Friend of CAGP • Ami(e) de l'ACPDPTM" award at the Annual National Conference.

To nominate someone who you feel deserves this award, please click [here](#) for full details and to download a Nomination Form.

Bursaries Available for the Annual Conference

Is your budget a bit strained this year? Have you been a member of CAGP for a minimum of 3 months and are in good standing? Do not miss the opportunity to [apply for a bursary](#) to pay for your early bird registration fees at the Annual Conference! Deadline for receipt of application is **March 10, 2010**.

We have been very fortunate to receive a record number of bursary opportunities this year. At time of printing, they are as follows:

Southern Alberta RoundTable Bursary Sponsor

One registration in the Southern Alberta area
One registration in any area of Canada where most needed

Greater Toronto RoundTable Bursary Sponsor

One registration in the Greater Toronto area
One registration in any area of Canada where most needed

Metropolitan Montreal RoundTable Bursary Sponsor

One registration in the Montreal area (plus \$100 in expenses)
One registration in any area of Canada where most needed (plus \$100 in expenses)

North Saskatchewan RoundTable Bursary Sponsor

One registration in the North Saskatchewan area
One registration in any area of Canada where most needed

Manitoba RoundTable Bursary Sponsor

Two registrations in Manitoba
One registration in any area of Canada where most needed

London RoundTable Bursary Sponsor

One registration in the London area

Niagara / Golden Horseshoe RoundTable Bursary Sponsor

One registration in the Niagara/Golden Horseshoe area
One registration in any area of Canada where most needed

Alberta North RoundTable Bursary Sponsor

Three registrations in the Alberta North area
One registration in any area of Canada, with preference to a member in Alberta North or Southern Alberta.

Windsor-Essex RoundTable Bursary Sponsor

One registration in the Windsor-Essex area



South Saskatchewan RoundTable Bursary Sponsor
One registration in the South Saskatchewan area
One registration in any area of Canada where most needed

Nova Scotia RoundTable Bursary Sponsor
One registration in Nova Scotia

Greater Vancouver RoundTable Bursary Sponsor
Two registration in the Greater Vancouver area (plus \$350 in expenses)
One registration in any area of Canada where most needed (plus \$350 in expenses)

Please contact Sharyon Smith at education@cagp-acpdp.org if you have any questions regarding any of these educational sessions.

Please join us in congratulating the following members for having achieved their CFRE designation:

Diana	Deakin-Thomas	Mississauga	ON
Catherine	Dorais-Plesko	London	ON
Mary	Heinmaa	Toronto	ON
Debbie	Kesheshian	Elmvale	ON
Allison	Kesler	Winnipeg	MB
Peggy	Killeen	Montreal	QC
Elaine	Fung	Richmond	BC

Upcoming Webinar – March 23, 2010 9:00 a.m. – 10:35 a.m. Pacific Time
A joint CAGP-ACPD and CGA-Canada educational offering!

Charitable administration is getting harder all the time.

This webcast will help you to:

- update and refresh your knowledge of significant changes announced in 2009
- identify planning opportunities that affect your clients or business
- ensure that you are able to file corporate income tax returns in compliance with existing and new laws
- equip yourself with new ideas for 2010 and subsequent taxation years

DeWayne Osborn, CGA, and Ian Barnes, CGA will be co-presenting this event.

Click [here](#) for further information.



A MESSAGE FROM OUR BOARD OF DIRECTORS

The Governance Model for CAGP/ACPDPTM

The Board of Directors for CAGP/ACPDPTM operates on a policy governance model, sometimes called the "Carver" model. What exactly is that, you ask? It is a common model used by non-profit organizations to try and ensure that:

- (a) The relationship between the membership, the board, and the executive director of the organization is robust;
- (b) There is an efficient means of furthering the organizations' goals, without duplicating effort or creating confusion as to who has responsibility for particular tasks; and
- (c) There is creative leadership and strategic thinking to move the organization forward, rather than being stuck in the present.

The Board's focus is on the future, rather than the day to day operations of the organization. Where should CAGP/ACPDPTM focus its resources? What should be the goals for CAGP/ACPDPTM as an organization? What should the organization be doing in five years? In ten years? These are the types of questions the Board asks and tries to answer to create a long-term strategy, based on the input from you, the members. That input is achieved from talking with you individually, as well as in the form of responses to the annual members' survey.

The other aspect of the Board's job is to represent the members in determining and supervising the organization's performance. That does not mean that the Board is heavily involved in the operations of the organization - for example, the Board does not organize or set out the agenda for the Banff course, or for the annual conference. Instead, the long term strategy is reduced by the Board to a specific set of concrete goals, known as "ends" or "outcomes", for the executive director to achieve. How those ends are actually achieved by the executive director are completely up to her, so long as the actions she takes are not prescribed by policies which are set out by the Board (which are known as "executive limitations policies").

The Board ensures that the executive director complies with those policies and also works to ensure that the executive director is reaching the ends which the Board set for her.

In this fashion, you, through the Board, set out the direction of CAGP/ACPDPTM, and in a broad sense, the means by which this organization moves forward in that direction.

Submitted by Roger Lee, CAGP-ACPDPTM Director of the Board.

Did you know?

The *Canadian Association of Gift Planners* now has a group on **LinkedIn!** The group will feature discussions, forums, networking opportunities and events in the world of gift planning. As a member of CAGP-ACPDPTM you will have access to all these benefits and more!

Click on the logo to join now to start in the fun!





CAGP-ACPDPTM 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](#).

Register Now!

Exciting events happening at this year's conference!

Friday, May 14, 2010- Optional Social Activity

Dinner at the Selkirk Hotel

5:30 pm. Leave for Fort Edmonton. 7:00 p.m. Dinner at Selkirk Hotel

The CAGP-ACPDPTM Alberta North RoundTable will be the hosts for an evening at the Hotel Selkirk, a beautiful reproduction of the original 1920's hotel. Experience the classic luxury of Edmonton's Hotel Selkirk nestled in the beautiful river valley at Fort Edmonton Park. Hotel Selkirk will make for a memorable dining experience. Let Fort Edmonton Park take you back in time!

Everyone is welcome so be sure to purchase extra tickets for friends and family when you register for this year's conference!

Price: \$65.00 (GST included)

Seating is limited. Deadline to purchase tickets is April 12, 2010.

Wear comfortable shoes for walking.

LEAVE A LEGACY™

A New Year with Great NEW LEAVE A LEGACY™ Initiatives to Come!

2009 was a momentous year for LEAVE A LEGACY™. Not only were we promoted in a number of publications; including Grandparent Magazine (93,000 copies), Charity Times magazine (30,000 copies), Globe and Mail - *Your Guide to Giving Back* (300,000 copies) – just to name a few - but we also created and developed our first-ever television and radio PSA that aired on numerous networks across Canada during the month of May!

Our 22 Committees, made up of over 50 CAGP-ACDPD™ volunteers, worked hard throughout the year and our success is definitely a symbol of their hard work. LEAVE A LEGACY™ would not have been able to accomplish what we did without the dedication of our Committee Chairs and volunteers. THANK YOU!

None of this would be at all possible without the financial and in-kind support from our National Development Sponsor, Great-West Life, London Life and Canada Life. Their dedicated support to LEAVE A LEGACY™ has provided a substantial increase in our LEAVE A LEGACY™ outreach. Without their assistance, our annual granting cycle to local programs would not be possible.

In 2010, we will continue to build on our success and take strides to ensure that all Canadians become familiar with LEAVE A LEGACY™ and *Make a Difference in the Lives that Follow*. For more information on LEAVE A LEGACY™, please contact Jennifer Paradis, National Coordinator, leavealegacy@cagp-acpdp.org or 1-888-430-9494 x 3.



STRONGER COMMUNITIES TOGETHER™



CAREER CORNER

<p>Deputy Head - Advancement</p>  <p>Please click here for more information</p>	<p>Posted: 01/19/2010 End: 02/18/2010 Location: Sherbrooke, Quebec</p>
<p>Director of Institutional Advancement</p>  <p>Please click here for more information</p>	<p>Posted: 01/19/2010 End: 02/18/2010 Location: Brandon, Manitoba</p>
<p>Chief Executive Officer</p>  <p>Please click here for more information</p>	<p>Posted: 01/28/2010 End: 02/27/2010 Location: Barrie, ON</p>
<p>Vice President, Investor Development</p>  <p>Please click here for more information</p>	<p>Posted: 01/29/2010 End: 02/28/2010 Location: Vancouver, BC</p>

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



CAGP-ACPDTM UPCOMING EVENTS

<p>2/11/2010 View more information</p>	<p>Greater Toronto RoundTable Event</p> <p>Lunch Education Session- Ethical Fundraising</p> <p>Thursday, February 11, 2010</p>
<p>2/17/2010 View more information</p>	<p>The 7th Annual Foundation Endowment and Not for Profit Investment Summit</p> <p>February 17th & 18th Toronto, ON</p> <p>Benefit from Canadian Association of Gift Planners partnership - Get 15% discount off the current investment price - Mention Code CAGP15 at the time of registration!</p>
<p>2/19/2010 View more information</p>	<p>Niagara/Golden Horseshoe Roundtable Event</p> <p>The Hidden Opportunity</p> <p>Friday, February 19, 2010 from 11:45a.m. - 1:30p.m.</p>
<p>2/23/2010 View more information</p>	<p>LEAVE A LEGACY Library Series</p> <p>The Truth About Powers of Attorney & Representation Agreements</p> <p>LEAVE A LEGACY Library Series</p> <p>Tuesday, February 23, 2010 from 1:30p.m. to 3:00p.m.</p>

Please visit www.cagp-acpdp.org for more information on upcoming events in your area.