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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 June 2009

This month I find myself complaining about the cold spring weather, and thought I should turn my thoughts to something warmer. Having distributed over \$60,000 in grant monies to the LEAVE A LEGACY™ awareness programs across the country this year, it warms me to see the wonderful awareness projects take place across the country this month of May.

Thanks to the funding from our development sponsor – Great-West Life, London Life and Canada Life – not only were we able to distribute grants but we also developed our first 30-second PSA. So throughout the month of May, the LEAVE A LEGACY™ television PSA was aired on a variety of networks throughout Canada in a number of communities. CTV stations aired the PSA across Canada; Shaw Television aired the PSA in Prince Albert, SK; Global Television aired the PSA in Regina; and Eastlink and Seaside cable television aired the PSA in Nova Scotia.

The television PSA has also been uploaded to YouTube in French and English (has been viewed 179 times in one month), as well as on the homepages of leavealegacy.ca and unheritageapartager.ca.

The radio PSA is being aired locally in Prince Alberta, Nova Scotia, Newfoundland, Calgary, Windsor and London, Ontario.

All LEAVE A LEGACY™ Chairs were mailed a high-res DVD copy of the PSA with a letter outlining the process for asking local stations to air the PSA at no cost. So the potential for distribution of this PSA to stations and on websites is endless.

If you have not yet seen the LEAVE A LEGACY™ PSA, check out www.leavealegacy.ca and click on the short video. To have a campaign that is running across Canada – complementing the work of the local LEAVE A LEGACY™ programs – is big news for CAGP-ACPD™. I hope members are able to explore ways of including the LEAVE A LEGACY™ material in their own material, in order to capitalize on the LEAVE A LEGACY™ brand and message.

Have a happy and hopefully warm month of June!

Diane MacDonald
 Executive Director



QUOTE OF THE MONTH

"When I grow up, I want to become a philanthropist!" His mother replied, "Why Johnny, that's wonderful." "Yeah," Johnny responded, "they all seem to have a lot of money."

CRA NEWS

June, 2009

[Consultation on proposed Guidance on the Protection of Human Rights and Charitable Registration](#)

[Revised Policy Commentary CPC-012, Expenses incurred by volunteers](#)

[The Canada Revenue Agency revokes the charitable status of The Children's Emergency Foundation](#)

CAGP-ACPDTM NATIONAL EDUCATION UPDATE

The May 12 – 17, 2009 Original Gift Planning Course at the Viamede Conference Centre and Resort and Spa, has now been completed. By all reports, the faculty of Norma Cameron and Joshua Thorne provided the group with outstanding learning opportunities in a fun, relaxed environment. Further comments from the evaluations include:

- Joshua and Norma are fantastic faculty, friendly and accessible and approachable. They responded and answered questions with ease and pulled the group back together when needed to stay 'on course'. It was an experience of a lifetime as a fundraiser and I would recommend to any in the field from beginning with a few years experience to someone like myself with over 15 years of fundraising experience. The course and its comprehensive detailed approach can fit into either and it is a benefit for all those who attend and actively participate. Loved it – loved it – benefitted from it – benefitted from it – and MORE!!!
- This course was well worth the time!
- What an absolutely terrific week.
- Thanks for all you (CAGP-ACPDTM) have done and continue to do!

We at the National Office would like to extend our heartfelt thanks to the Faculty as well as the attendees for a wonderful week of education!

Book this date - [May 12-14, 2010](#), Edmonton, Alberta

The 17th CAGP-ACPDTM Annual National Conference

Please contact Sharyon Smith at education@cagp-acpdp.org if you have any questions regarding this session.



NEXT Original Canadian Gift Planning Course

October 20 – 25, 2009

Banff Conference Centre, Banff, Alberta

Faculty: Grant Monck and Brian Shea

Don't miss out! This is the last Original Course being offered in 2009 - To be placed on the Interested Participants list for this session, please contact Sharyon Smith at education@cagp-acpdp.org Registration for this session will open in the summer of 2009.

ADVANCED Canadian Gift Planning Course

September 22 – 27, 2009

Whistler Village Delta Suites Hotel, British Columbia

Faculty: Malcolm Burrows and Susan Manwaring

Calling all professional advisors, accountants, insurance agents or estate planners, and seasoned gift planners involved in charitable giving - this course is for you!

This course has been pre approved for both Advocis and CFRE continuing education units and is one not to be missed. Approach 2010 with the latest information on:

- Tax Aspects of Gift Planning in Canada • Charitable Bequests & Endowments
- CRT's & Publicly Listed Securities • Charitable Gift Annuities
- Cultivation of Prospects • Gifts of Life Insurance • Advanced Planned Giving Topics
- Recognition of Donors • Stewardship • Marketing
- Starting a Gift Planning Program • Dealing with the Subject of Death
- Ethical & Liability Issues • Group Case Studies

Space is limited – register today - follow this link for full and further information and registration:
[Advanced Course](#)



Whistler Village Delta Suites Hotel, British Columbia-



As LEAVE A LEGACY™ continues to grow and awareness builds, the National Office receives many questions about the differences between CAGP-ACPDPTM RoundTables & LEAVE A LEGACY™ Committees, as well as CAGP-ACPDPTM memberships & LEAVE A LEGACY™ partnerships. Please see below for a summary of each.

CAGP-ACPDPTM RoundTable vs. LEAVE A LEGACY™ Committee

Currently there are 21 CAGP-ACPDPTM Roundtables across Canada. *A RoundTable is a volunteer-based group of CAGP-ACPDPTM members with the mandate to provide local gift planning educational offerings, such as workshops, seminars, luncheons and networking opportunities.* A RoundTable is composed of committees under the direction of a RoundTable executive committee. The LEAVE A LEGACY™ committee is one of the committees directed by the local RoundTable.

The LEAVE A LEGACY™ Committee is responsible for planning the LEAVE A LEGACY™ activities throughout the year. *A LEAVE A LEGACY™ program is a local public awareness initiative with the mandate of encouraging the idea of leaving a gift to a charitable organization in your will.* These initiatives vary throughout the country and throughout the year. Sample initiatives include newspaper inserts & supplements, LEAVE A LEGACY Seminars for the public, bus advertising, donor appreciated events, local radio and television public service announcements, billboards, etc.

CAGP-ACPDPTM Membership vs. LEAVE A LEGACY™ Partnership

Membership with the CAGP-ACPDPTM is an individual membership. Individuals join CAGP-ACPDPTM to experience the many benefits that membership has to offer them in terms of providing for educational opportunities relevant to the profession of gift planning.

Local LEAVE A LEGACY™ initiatives present an opportunity for your whole organization to be represented. For instance, your local LEAVE A LEGACY™ program may be embarking on preparing an insert on gift planning in your local paper – an opportunity for your organization to participate with an advertisement or article. For information on opportunities for your organization and how you can get involved, please contact your local Chair and/or Co-Chair by visiting this link:

<http://www.leavealegacy.ca/program/help/locate-a-program/>

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





CAREER CORNER

<p>Chief Executive Office, Oakville Hospital Foundation</p>  <p>Halton Healthcare</p> <p>For more information, click here.</p>	<p>Posted: 05/13/2009 End: 06/12/2009 Location: Oakville-Trafalgar</p>
<p>Manager, Gift Planning</p>  <p>Canadian Red Cross Croix-Rouge canadienne</p> <p>For more information, click here.</p>	<p>Posted: 05/29/2009 End: 06/17/2009 Location: Lower Mainland, BC</p>
<p>Director, Corporate and Individual Giving</p>  <p>Alberta CANCER FOUNDATION</p> <p>For more information, click here.</p>	<p>Posted: 05/25/2009 End: 06/25/2009 Location: Edmonton, Alberta</p>
<p>Senior Development Manager</p>  <p>St. Joseph's Healthcare Hamilton FOUNDATION</p> <p>For more information, click here</p>	<p>Posted: 05/28/2009 End: 06/28/2009 Location: Hamilton, Ontario</p>
<p>Planned Giving Advisor</p>  <p>World Vision</p> <p>For more information, click here</p>	<p>Posted: 05/29/2009 End: 06/13/2009 Location: Mississauga, Ontario</p>

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



MyCharityConnects Conference

June 8-9, 2009

MaRS Discovery District | Toronto, Ontario

The MyCharityConnects conference will help charities learn about using online technology to improve their fundraising and marketing.

If you've ever said any of the following:
"What's web 2.0 and what's all the buzz about anyway?"
"My donors aren't on the web; I don't need to do this."
"We're on Facebook but we're not seeing any results."
... then MyCharityConnects is for you.

CanadaHelps is proud to host this two-day "Bachelor's level" learning opportunity for fundraisers and marketers in the charitable sector. Comprised of 4 keynotes and 25 workshops on various "philanthropy 2.0" topics including social networking, online fundraising campaigns, e-newsletters and blogs, attendees will walk away with decision making tips, best practices, new ideas and a greater sense of return on investment.

Attendees of MyCharityConnects must be employees or board members of a registered charity or non-profit organization. [Click here for more information](#)

**This ad is provided through a special agreement with CanadaHelps.org*

Doing Well by Doing Good

Growing Your Practice through Philanthropy

A One Day Educational Conference for Professional Advisors

CAGP-ACPDTM is proud to be a Conference Partner with Mindpath Financial Conferences in providing this educational offering at a discounted rate of **\$99 for CAGP-ACPDTM members!!!**

Date: Wednesday June 17th, 2009

Location: Mississauga Convention Centre

Website: <http://www.mindpath.ca/Mindpath-June172009.pdf>

Audience: Professional Advisors

Credits: 6.0 CE Advocis Credits

To register for the Doing Well by Doing Good Conference online, click [here](#).

For complete information about the **Program Agenda, Speakers and Content**, Click [here](#) or on the thumbnail image below to view the **Conference PDF brochure**.





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
Clayton	Atto	Amnesty International	Greater Toronto
Don	Bridgman	Assanted Capital Management	Niagara/Golden Horseshoe
Belinda	Chun	Canadian Diabetes Association	Greater Toronto
Vicki	Cummings	CNIB	Ottawa
Kevin	Davidson	Mennonite Foundation of Canada	Southern Alberta
Catherine	Dorais-Plesko	The University of Western Ontario	London
Kristina	Gebhard	Alzheimer Society of Saskatchewan	Saskatchewan South
Marie-Claude	Giguère	Université Laval	Greater Montreal
Cheryl	Hopkins	Walkerton & District Hospital Foundation	Waterloo-Wellington
Tracy	Keith	Cochrane & Area Humane Society	Southern Alberta
Brian	Kon	Greater Niagara General Hospital Foundation	Niagara/Golden Horseshoe
Linna	Morgan	Linna Morgan Consulting	Southern Alberta
Derek	Rumboldt-deLouche	The Children's Wish Foundation of Canada	Newfoundland



THE CAGP-ACPDTM WOULD LIKE TO CONGRATULATE THE FOLLOWING CFRE GRADUATES

First Name	Last Name	City	State	Country
Ann	Andrusyszyn	Barrie	ON	CANADA
Sherry	Booth	Peterborough	ON	CANADA
Cary	Gaymond	Vancouver	BC	CANADA
Susan	Hardy	London	ON	CANADA
Elizabeth	Moxham	Vancouver	BC	CANADA
Stephanie	Miller	Stouffville	ON	CANADA
Cindy	Carson	Brantford	ON	CANADA
Adrienne	Davidson	Hamilton	ON	CANADA
Joanne	Beaton	St. Thomas	ON	CANADA
Joanna Munroe	Luciano	Ottawa	ON	CANADA
Lynne	Milnes	Victoria	BC	CANADA
Vanessa	Abaya	Toronto	ON	CANADA
Rosemary	Spicer	Halifax	NS	CANADA

CAGP-ACPDTM UPCOMING EVENTS

06/02/2009 View more information	Niagara/Golden Horseshoe RoundTable A Professional Development Luncheon and AGM Now More Than Ever: Legacy Giving in Uncertain Times
06/03/2009 View more information	Manitoba RoundTable <i>Alain Lévesque, President of DeVimy Group and author of George's Tree: The story of a well Planned Gift. Alain is a specialist in gift planning.</i>
06/08-09/2009 View more information	MyCharityConnects MaRS Discovery District Toronto, Ontario
06/17/2009 View more information	Mindpath Financial Conference Doing Well by Doing Good
06/18/2009 View more information	Greater Toronto RoundTable Lunch Education Session Your Website- Does It Give People What They Want?
06/19/2009 View more information	London & Region RoundTable TGIF Lunch and Learn Series

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