

In this Issue

- A NOTE FROM THE EXECUTIVE DIRECTOR
- 2009 NATIONAL CONFERENCE NEWS
- FRIENDS OF CAGP-ACPD™ AWARD
- BOARD OF DIRECTORS UPDATE
- CRA NEWS
- EDUCATION REPORT
- LEAVE A LEGACY™
- CAREER CORNER
- WELCOME NEW MEMBERS
- UPCOMING EVENTS MAY/JUNE 2009

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May 2009 VOL 20 NUMBER 5

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 May 2009

Report from the Executive Director

Many CAGP-ACPD™ members have written me to congratulate us on the wonderful conference experience they had last month in Niagara Falls. As many of you know, success at CAGP-ACPD™ does not happen on its own. Success often happens when staff and volunteers work together for a single cause. And this year's team was no exception.

Congratulations to the Niagara/Golden Horseshoe RoundTable for hosting the Conference this year. The Host Committee was chaired by Mary Kay Aird and her wonderful team. Thank-you as well, to Diane Laundry, our Conference Planner and the CAGP staff for their work throughout the year. It is also important to thank the National Programming Committee chaired by Michelle Osborne and her team for putting together a wonderful and diverse program this year. And thank you to our presenters, who in keeping with our own philanthropic spirit, give of their own time freely to CAGP-ACPD™ and for that, we are most grateful!

Most of all, I would like to thank all of those who participated in the CAGP-ACPD™ Conference - both as volunteers, participants and sponsors - because by sharing your ideas and stories - you make the conference better each year. For those of you who were unable to attend, we hope to see you next year in **Edmonton - May 12-14, 2010!**

Diane MacDonald
 Executive Director



2009 FRIEND OF CAGP-ACPDPTM AWARD

During the CAGP-ACPDPTM Annual Conference Banquet on April 23rd 2009, it was with great pleasure that the CAGP-ACPDPTM Board of Directors honoured the recipients of the *2009 Friend of CAGP-ACPDPTM Award* – **Sara Neely and Martin Massé**



Sara- second from left, Martin- third from left.

Sara P. Neely, LL.B., CFRE

Sara is a leader in the planned giving community in Canada. Sara's knowledge, wisdom, and character have made her a mentor and role-model for many people. Sara began her career as a wills and estates lawyer at an international law firm in Vancouver. In 1992, she joined BC Children's Hospital Foundation as Gift & Estate Planning Manager to create one of the first planned giving programs in a British Columbia charity. Sara was later promoted to Director. She obtained her CFRE in 2004.

Sara begins a new journey in philanthropy with the Victoria Foundation in March 2008, as Director of Philanthropic Services. She manages estate gifts, building relationships with professional advisors, assisting with donor and advised-fund relations, liaising with the BMO/Community Foundation initiative and working with Hosted Organizations to maximize their potential.

As the founding chair of Leave A Legacy British Columbia and one of the early leaders of CAGP Vancouver Roundtable, Sara has been instrumental in making planned giving messages part of every-day vocabulary.

She is an active writer and a sought-after presenter sharing information about planned giving with professionals and donors. She has worked diligently working to advance the art and science of planned giving, not only for the organizations for which she has worked and volunteered, but for all charities across Canada. Sara has written and published over 120 articles on a wide variety of topics in BC Children's Hospital Foundation's donor magazine *Speaking of Children*; in *Planned Giving Today*, a US newsletter; in *Gift Planning in Canada*; and in the *Scrivener*, a monthly journal for Notary Publics.

She has also written and presented papers at local, provincial and national conferences and meetings. She presented at the first three Canadian Association of Gift



Planning Conferences, from 1994 to 1996, as well as at subsequent conferences. She has also presented papers for the Canadian Bar Association, The Estate Planning Council, Leave A Legacy, and CAGP Roundtables in Vancouver, Victoria and the Fraser Valley. She taught the Charities Law course in the Faculty of Law at the University of Victoria.

In 2004, Sara moved to Vancouver Island with BC Children's Hospital Foundation, where she continued to direct the Gift & Estate Planning program as well as be involved in both major and annual giving programs for the Foundation. She has also established herself as a key resource for the professional and charitable giving community on Vancouver Island. She is a member of the Estate Planning Council, and the Vancouver Island CAGP Roundtable. She is also on the Board of the Victoria Symphony.

Under Sara's leadership, BC Children's Hospital Foundation's planned giving program grew to provide a reliable donation stream to the Foundation averaging \$5 million per year. This accounts for between 10-35% of the Foundation's annual donations.

Martin Massé

Martin has his Ph.D. in criminology and an MBA. He has worked for over 25 years as a director and manager in the social services sector and in various nonprofit organizations.

Martin worked at **The Endeavours of Cardinal Léger**, as senior advisor in planned giving from 1998 to 2002. From November 2002 to June 2008, he was the program director of planned giving at **St. Joseph's Oratory of Mount Royal**.

From September 2007 to June 2009, Mr. Massé contributed to the "philanthropic management" at **Cégep Saint-Laurent** through his teachings. In addition, he was a member of the Canadian Charitable Annuity Association.

Mr. Massé was involved with the CAGP-ACPDPTM at various levels. He acted as president of the Montreal Round Table until 2003. In 2000, he participated in the creation and the establishment of the program "UN HÉRITAGE À PARTAGER" and was a member of the LEAVE A LEGACY™ program.

A "Friend of ~ Ami(e) de CAGP-ACPDPTM" must have:

- practiced or operated in an exemplary and ethical manner;
- exemplified vision, talent and dedication to CAGP-ACPDPTM and society;
- made a significant contribution to CAGP-ACPDPTM or to gift planning in Canada.

A call for nominations is put out each year and this year there were six nominations. A "Friend of ~ Ami(e) de CAGP-ACPDPTM" is identified by a committee of the Board of Directors of CAGP-ACPDPTM, approved by the Board and is recognized during the annual CAGP-ACPDPTM Conference.

The Canadian Association of Gift Planners would like to recognize Sara Neely and Martin Massé for their continuing dedication to the field of planned giving and for their tireless contributions to the CAGP-ACPDPTM. **Thank you and congratulations!**



2009 NATIONAL CONFERENCE NEWS

The following are the prize winners from the 2009 Annual National CAGP-ACPDPTM Conference in Niagara Falls!

Company	Prize	Winner
CAGP-ACPD Board	Complimentary 2010 Conference registration / Complimentary registration to CAGP Original Gift Planning Course	Harold Penner, Mennonite Foundation of Canada Stephanie Yamniuk- Canadian Red Cross, Winnipeg
Sheraton on the Falls	Complimentary accommodation	Andrea Page, Stratford General Hospital Foundation
CAGP-ACPD Annual General Meeting	Complimentary CAGP membership	Jane Jamieson, Grand River Hospital Association
CIDEL Bank and Trust Ltd.	ipod shuffle & \$250 Donation to charity of your choice	Bev Trist-Stewart, The Lung Association
Blackbaud, Inc.	Video Flip CamCorder	Shannon Cottrell, The Anglican Church of Canada
Miller Thomson LLP	Tom Tom Navigation System	Jim Allen, Parkinson Society Canada
Mackenzie Investments	1. Bar Gift Set 2. Tea Gift Set	Rowena Griffiths, Carleton University Maria Reilander, Our Lady Seat of Wisdom Academy
PlanGiv	Inniskillin Travel Cooler Wine Bag	Peggy Killeen, Royal Victoria
Charity Life Direct	Digital photo frame	Teanna Brown, Brock University
CharityVillage.com	Certificate for a CharityVillage Campus Course	Maurice Prevost, University d'Ottawa
RBC Financial Group	Golf Balls for the Golf Lover	Janet Kranz, Canadian Cancer Society
T.E. Wealth	1. GPS unit 2. Computer bag	John Mitchell, Mt. St. Vincent University Mary Anne Comuzzi, St Joseph's Fondation of Thunder Bay



Meritas Socially Responsible Investments	<ol style="list-style-type: none"> 1. Golf shirt 2. Golf Shirt 	<p>Brian Kon GNGH Ken McGowan, Comm. Of Christ</p>
Foyston, Gordon & Payne Inc.	<ol style="list-style-type: none"> 1. Golf Package - jacket, hat & balls 2. Golf Package - jacket, hat & balls 3. Desk Package 4. Desk Package 	<ol style="list-style-type: none"> 1. Rowena Griffiths, Carleton University 2. Dennis Kiffiak, Carleton University 3. Diane Haarstad, BC Childrens Place 4. Karen Flynn, Salvation Army
LEAVE A LEGACY™	Samsung 7" Digital Picture Frame	Tim Maloney, Mercy Ships Canada
FUNDING matters Inc.	Giftabulator License Valid for one year Value \$7,500	Peter Chipman, Children's Charity of British-Columbia
Logilys- ProDon	Quebec Maple Syrup Liquers and Maple Syrup Aperitif	Susan Malcolm, Aberdeen Health Foundation
Exhibit Hall Game	<ol style="list-style-type: none"> 1. 'Iceberg Philanthropy' by Fraser Green 2. 'Give Smart' by Elaine Kelly 3. 'Give Smart' by Elaine Kelly 4. Two bottles of Private Label Wine 5. Inniskillin VIP Tasting for 2 6. Jackson Triggs Niag Estate Tour Pkg 7. 2010 Conference registration 	<ol style="list-style-type: none"> 1. Wendy McGuinness, Dalhousie University 2. Monica Carlsberg, University of Manitoba 3. Marilyn MacDonald, Canadian Red Cross 4. Yolanda Benoit, Surrey Memorial Hosp 5. Helen Thompson, Bruce Peninsula Health 6. Maria Dimson, YMCA of Toronto 7. Neil Leslie, Scouts Canada Foundation
TD Waterhouse	Book: The Wine Bible	Peggy Killeen, Royal Victoria



UPDATE FROM THE CAGP-ACPDTM NATIONAL BOARD

CAGP-ACPDTM is pleased to introduce its Board of Directors for the 2009-2010 year:

Greg Lichti – Chair
Roger Lee – Vice Chair
Rosemarie Sampson - Secretary
Tom Riglar - Treasurer
Luce Laguë
Charlotte Lawson
Marilyn Monson
Charles O’Neil
Linda Pearson

The CAGP-ACPDTM would like to welcome Charles O’Neil, B.A., B.Ed, EPC Gift Planning Advisor, to the CAGP-ACPDTM board of directors. Charles’ biography can be found on the CAGP-ACPDTM website. [Click here for more information.](#)

The CAGP-ACPDTM would also like to recognize and thank our outgoing board members for their tremendous hard work and dedication in the field of gift planning.

David W. Brown, Partner AL G. Brown and Associates and **Naomi Kreutzwieser** Development Officer, University of Saskatchewan, College of Arts & Science.

Thank you and good luck in your future endeavours.

QUOTE OF THE MONTH

Unless someone like you cares a whole awful lot, nothing is going to get better. It’s not. –

-From *The Lorax* by Dr. Seuss

CRA NEWS

May, 2009

[Revised Summary Policy CSP-R20, Research](#)

[New Guidance CPS-029, Research as a Charitable Activity](#)

[Revised Summary Policy, CSP-S14, Sport](#)

[New guidance, CPS-027, Sports and Charitable Registration](#)



CAGP-ACPDPTM NATIONAL EDUCATION UPDATE

Registration Opened April 17th

ADVANCED Canadian Gift Planning Course
September 22 – 27, 2009
Whistler Village Delta Suites Hotel, British Columbia



Whistler Village Delta Suites Hotel, British Columbia

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. Registration for Members \$1350, non-member \$1550; suite hotel accommodation including all meals is \$260 per person per night.

This course has been pre approved for both Advocis and CFRE continuing education units.

Please follow this link for full and further information and registration: [Advanced Course](#)

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

The 17th CAGP-ACPDPTM Annual National Conference

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



**March Original Gift Planning Course Graduates:
March 3 - 8, 2009**

Crystal Aboud-Mahar	Cape Breton University
Judith Arnason	Canadian Cancer Society, MB. Division
Christine Basque	Canadian Breast Cancer Foundation, BC/Yukon Region
Gerald Barkman	Mennonite Foundation of Canada
Lucie Drapeau	Maisonneuve-Rosemont Hospital Foundation
Melanie Dekker	Aspen Family and Community Network Society
Kevin Davidson	Mennonite Foundation of Canada
Elaine Fung	Richmond Hospital Foundation
Agathe Grinberg	Hema-Quebec Foundation
Penny Holmes-Tuor	Canadian Blood Services
Alasdair Hooper	Casey House Foundation
Byron Jacobs	The Salvation Army
Marian Jones	Youville Centre
Renita Jubinville	Lloydminster Region Health Foundation
Anne Kirkpatrick	Okanagan College
Cecily Lawrenson	United Way of the Lower Mainland
Frank Lockington	St. Lawrence College
Paula MacNeil	Cape Breton University
Penny Manners	Lloydminster Region Health Foundation
Bonnie Megley	Royal Alexandra Hospital Foundation
Kathryn Needham	Northern Ontario School of Medicine
Kaman Ng	Crisis Intervention & Suicide Prevention Centre of BC
Anne Ohlgren	ShelterBox Canada
Don Ohlgren	ShelterBox Canada
Rob Pepper	United Way Windsor-Essex
Pat Phinney	The Salvation Army
Laurie Pringle	ALS Society of Canada
Sjors Reijers	CUSO-VSO
David Rain	USC Canada
Lois Reimer	Canadian Breast Cancer Foundation, BC/Yukon Region
Nadine Saumure	Fondation de l'Hôpital Maisonneuve-Rosemont
Laura Svajlenko	CKUA Radio Network
Heather Stevens	Alberta Children's Hospital Foundation
Jyotsana Saha	McMaster University
Heather Travis	United Way of the Lower Mainland
Lori Whitby	Northern Lakes College
Amanda Williams	West Island Palliative Care Residence



LEAVE A LEGACY™

May is National LEAVE A LEGACY™ Month - the annual celebration of the LEAVE A LEGACY™ program across Canada!



LEAVE A LEGACY™ Public Service Announcement

Click above to view the LEAVE A LEGACY™ Public Service Announcement on YouTube

LEAVE A LEGACY™ is a national public awareness program designed to encourage people to leave a gift through their will or any other gift planning instrument to a charity or non-profit organization of their choice. LEAVE A LEGACY™ is a donor-oriented education campaign to raise awareness of the importance of including a charitable gift in the estate planning process.

May LEAVE A LEGACY™ Events

London LEAVE A LEGACY™ Committee	May 15, 2009 Story of my Life: Donor Panel London Club
Greater Vancouver LEAVE A LEGACY™ Committee	May 20, 2009 Public Forum – What Estate Planning Can Offer You Morgan Creek Golf Club
Newfoundland LEAVE A LEGACY™ Committee	May 21, 2009 LEAVE A LEGACY™ Breakfast The Fluvarium
Alberta South (Calgary) LEAVE A LEGACY™ Committee	May 23, 2009 Legacy Seminar Series, Free Public Seminars: Wills, Estates, and End-of-Life Issues Mount Royal College
Greater Vancouver LEAVE A LEGACY™ Committee	May 28, 2009 Public Forum – What Estate Planning Can Offer You H.R. MacMillan Space Centre Auditorium
Niagara/Golden Horseshoe LEAVE A LEGACY™	June 2, 2009 Professional Development and luncheon & AGM Now More Than Ever: Legacy Giving in Uncertain Times



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.



STRONGER COMMUNITIES TOGETHER™

CAREER CORNER

<p>Fund Development Associate</p>  <p>For more information, click here.</p>	<p>Posted: 04/17/2009 End: 05/17/2009 Location: Red Deer, Alberta</p>
<p>Manager, Gift Planning</p>  <p>Canadian Red Cross Croix-Rouge canadienne</p> <p>For more information, click here.</p>	<p>Posted: 05/01/2009 End: 05/31/2009 Location: Alberta (Calgary or Edmonton Location)</p>
<p>Chief Executive Officer</p> <p>Oakville-Trafalgar Memorial 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>

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



Doing Well by Doing Good *Growing Your Practice through Philanthropy* A One Day Educational Conference

CAGP-ACPDTM is proud to be a Conference Partner with Mindpath Financial Conferences in providing this educational offering for Professional Advisors.

Date: Wednesday June 17th, 2009

Location: Mississauga Convention Centre

Website: http://www.mindpath.ca/conferences_events.html

Audience: Professional Advisors

Credits: 6.0 CE Advocis Credits

This One-Day Conference Features:

- ~ Philanthropic landscape in today's economic environment
- ~ Why philanthropy is more important than ever as an estate planning strategy
- ~ Turning a slow economy into an advisor's advantage using philanthropy
- ~ The do's and don'ts when it comes to integrating philanthropy into your practice
- ~ How advisors and charities can work together
- ~ Understanding donations and tax 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
Jane	Anema	Sarnia Community Foundation	Greater Toronto
Michelle	Brome	Canadian Cystic Fibrosis Foundation	Greater Toronto
Linda	Clemow	The Lung Association	Greater Toronto
Lorie	Colledge	CIBC Trust Corporation	Niagara/Golden Horseshoe
John	Drake	Manulife Securities Inc.	Greater Toronto
Doug	Earle	Brock University	Niagara/Golden Horseshoe
Pam	Goodyear	The Salvation Army	Waterloo-Wellington
Connie	Hykaway	Miller Thomson LLP	Southern Alberta
Gail	Kendall	University of Guelph	Waterloo-Wellington
Laura	Lansink	Trinity Western University	Greater Vancouver
Theresa	Man	Carters Professional Corporation	Greater Toronto
Gillian	Manning	TD Asset Management	Greater Toronto
Meredith	Meads	The National Ballet of Canada	Greater Toronto
Felicia	Migliore	Parkinson Society Central and Northern Ontario	Greater Toronto
Darcie	Nastiuk	The Mount Royal College Foundation	Southern Alberta
Kimra	Shillingford	The Bruce Trail Conservancy	Niagara/Golden Horseshoe
Bev	Trist-Stewart	The Lung Association	London
Neil	Williams	Sait Polytechnic	Southern Alberta



CAGP-ACPDTM UPCOMING EVENTS

05/21/2009 View more information	Greater Toronto RoundTable Gifts of Insurance May 21, 2009
06/17/2009 View more information	Mindpath Financial Conference Doing Well by Doing Good June 17, 2009
06/03/2009 View more information	Manitoba RoundTable <i>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.</i> Wednesday June 3rd, 2009
06/18/2009 View more information	Greater Toronto RoundTable Lunch Education Session Your Website- Does It Give People What They Want? June 18th, 2009
06/19/2009 View more information	London & Region RoundTable TGIF Lunch and Learn Series Friday June 19th, 2009

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