

March 2010

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For more information please contact:

CAGP-ACPD™
 Head Office:
 325 Dalhousie
 Suite 201
 Ottawa, Canada
 K1N 7G2
 1-888-430-9494
 Fax (613) 232-7286

A NOTE FROM THE EXECUTIVE DIRECTOR

March 4th 2010, was a very special day for registered charities in Canada. That was the day that the details of the Federal Budget 2010 were announced – when the disbursement quota rule was eliminated.

The following key findings are the implications for Canadian charities in the 2010 Budget:

- Changes that eliminate the current 80/20 rule which requires charities to spend 80% of the previous year's tax receipted donations. This also means the provisions related to enduring property, ten year gifts, capital gains pool etc, will no longer be necessary and are therefore repealed.
- What remains is the requirement that charities disburse at a minimum disburse 3.5% of capital (being assets not currently used in charitable programs or administration).
- There is currently an exemption from the capital accumulation rule for charities having \$25,000 or less in assets not used in charitable programs or administration. The 2010 budget proposes to increase this threshold to \$100,000 for charitable organizations (it will remain at \$25,000 for charitable foundations). This increase will reduce the compliance burden on small charitable organizations and provide them with greater ability to maintain reserves to deal with contingencies.
- The threshold for charitable foundations will remain at \$25,000.
- Budget 2010 proposes to reform these rules for fiscal years that end on or after March 4th, 2010.

The Canadian Association of Gift Planners (CAGP-ACPD™), along with other sector organizations, was successful in representing our members in asking the government to make changes to the disbursement quota regime. CAGP-ACPD™ would like to thank Susan Manwaring, Chair of our Government Relations Committee. We would also like to thank the Department of Finance, Imagine Canada, the Canadian Bar Association, the Muttart Foundation and all the organizations that participate on the Government Relations Coordinating Group Committee (AFP, AHP, CFC, PFC etc) for this collaborated effort. We feel the charitable sector was successful in our efforts to come together to work with the government on issues surrounding the disbursement quota.

This decision is important for charities large and small across the country. A great budget day for Canadian charities!

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

For information on the Federal Budget 2010, click here:

<http://www.budget.gc.ca/2010/plan/toc-tdm-eng.html>



QUOTE OF THE MONTH

Generosity gives assistance, rather than advice.
Vauvenargues

CRA NEWS

March 2010

- The registration for the March 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

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 – London Ontario, Windermere Manor Conference Centre – Click [here](#) to Register Now!

May 11, 2010 - Edmonton Alberta, Westin Edmonton - Click [here](#) to Register Now!

May 27, 2010 -Waterloo/Wellington, Four Points by Sheraton, Cambridge, ON- Click [here](#) to Register Now!

June 15, 2010 – Toronto Ontario, Ryerson University - Registration Opening Soon!

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

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!](#)

LEAVE A LEGACYTM

We all know that finding Canadian statistics on planned gifts can be difficult. The samplings are often small and charities and donors are often reluctant to share their gift planning activities.

CAGP-ACPDPTM members are fortunate to receive the monthly LEAVE A LEGACYTM *Stories and Stats* eBlast - with the best statistics we can find. We often hear from our members requesting to re-send an eBlast they found particularly interesting or relevant to their work and have misplaced it.

We are happy to announce that now available in the Members-Only section of [cagp-acpdp.org](#), you can find **all** LEAVE A LEGACYTM *Stories and Stats* eBlasts. You can locate these statistics by logging into your account, selecting "Gift Planning Tools" and clicking on the link - "LEAVE A LEGACYTM *Statistic's* - all categorized by month and year.

For more information about LEAVE A LEGACYTM and how you and your organization can benefit from the program, please contact Jennifer Paradis, National LEAVE A LEGACYTM Coordinator at leavealegacy@cagp-acpdp.org.



STRONGER COMMUNITIES TOGETHER™



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
Kelly	Schaus	King's University College	London
Sandra	Preikschat	Between the Lines designs	Saskatchewan South
Stephen	Faul	Second Harvest	Greater Toronto
Jocelyne	Hamoline	Roman Catholic Diocese of Saskatoon	Saskatchewan North
Michel	Tremblay	Fondation Hôpital Saint-Eustache	Greater Montreal
Zahra	Valani	Branksome Hall	Greater Toronto
Barbara	Sutton	Sick Kids Foundation	Greater Toronto
Arnold	Friesen	Mennonite Foundation of Canada	Greater Vancouver
Hans	Pilz	Allen Gray Continuing Care Centre	Alberta North
Corinne	Shannon	MS Society of Canada	Greater Toronto
Ross	Hoult	Star Crown Global Relief	Saskatchewan North
Nicole	Chouinard	Centraide Saguenay- Lac St. Jean	Greater Montreal
Naoshad	Pochkhanawala		Greater Toronto
Rémy	Gagnon	Église catholique de Québec	Quebec City (l'est du Québec)
Debbie	Findlay	Toronto General & Western Hospital Foundation	Greater Toronto
Carla	Eisler	Brandon University	Manitoba
Donna	Grainger	East Kootenay Foundation for Health	Southern Alberta
Tim	Ramsay		Southern Alberta
Jacques	Jalbert		Greater Montreal
David	McCart		Quinte (Belleville)
André	Bisson	École de technologie supérieure	Greater Montreal
Amparo	Jardine	Heart and Stroke Foundation of Ontario	Greater Toronto



Helen	Armstrong	Niagara College Foundation	Niagara/Golden Horseshoe
Shy	Kurtz		Greater Toronto
Pierre-Michel	Simard	Financière Liberté 55	Quebec City (l'est du Quebec)
Tracey	Brown	BC Cancer Foundation	Greater Vancouver
Leslie	Mitchell	Alzheimer Society London and Middlesex	London
Bernard	Larivière	Banque nationale	Greater Montreal



CAREER CORNER

 <p>Executive Director Belleville General Hospital Foundation</p> <p>Please click here for more information</p>	<p>Posted: 02/09/2010 End: 03/11/2010 Location: Belleville, Ontario</p>
 <p>Stewardship Consultant</p> <p>Please click here for more information</p>	<p>Posted: 02/18/2010 End: 03/20/2010 Location: St. Catharines, Ontario</p>
 <p>Major Gifts and Alumni Development Officer</p> <p>Please click here for more information</p>	<p>Posted: 02/25/2010 End: 03/27/2010 Location: Ottawa, ON</p>
 <p>Director of Planned Giving</p> <p>Queen's is proud to be among Canada's top 100 employers.</p> <p>Please click here for more information</p>	<p>Posted: 02/26/2010 End: 03/13/2010 Location: Kingston, ON</p>
 <p>Executive Director, Development</p> <p>Queen's is proud to be among Canada's top 100 employers.</p> <p>Please click here for more information</p>	<p>Posted: 02/26/2010 End: 03/28/2010 Location: Kingston, ON</p>
 <p>CFO/Executive Director</p> <p>A Great School</p> <p>Please click here for more information</p>	<p>Posted: 03/03/2010 End: 04/02/2010 Location: Toronto, ON</p>

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



CAGP-ACPDTM UPCOMING EVENTS

<p>3/16/2010</p> <p>View more information</p>	<p>Greater Vancouver RoundTable Event Wills Variation and its Impact on Charities Joint Meeting with Fraser Valley Estate Planning Council</p> <p>Tuesday, March 16, 2010 from 6:00p.m - 8:30p.m.</p> <p>Eagle Quest Golf Centres at Coyote Creek</p>
<p>3/17/2010</p> <p>View more information</p>	<p>RoundTable event in Montreal Philanthropie et dons planifiés (Une demi-journée de formation)</p> <p>*Presentations in both English and French</p> <p>Mercredi 17 mars 2010 - 8H à 1H30 Le Nouvel Hôtel, Salles Mathieu et Atwater</p>
<p>3/17/2010</p> <p>View more information</p>	<p>Southern Saskatchewan RoundTable Event ProDon Software product demonstration by Logilys*</p> <p>Wednesday March 17, 2010</p> <p>11:30a.m - 1:15p.m. (lunch session)</p>
<p>3/18/2010</p> <p>View more information</p>	<p>Greater Toronto RoundTable Breakfast Education Session Gifts of Registered Plans to Charity: RSPs, RIFFs, TFSA's</p> <p>Thursday, March 18, 2010</p> <p>Registration & Breakfast -8:00a.m. - 8:30a.m. Education Session - 8:30a.m.-9:30a.m.</p> <p>Ted Rogers School of Management Toronto ON</p>
<p>3/23/2010</p> <p>View more information</p>	<p>RoundTable event in Niagara/Golden Horseshoe Why the New Media is Old Hat</p> <p>Tuesday, March 23 from 11:45a.m. - 1:30p.m. (Registration begins at 11:30a.m.)</p> <p>Burlington Golf & Country Club, 422 North shore Blvd East</p>
<p>3/31/2010</p> <p>View more information</p>	<p>Greater Victoria LEAVE A LEGACYTM Event</p> <p>Legacy Giving - The Joys of Giving & Receiving Tuesday, March 30, 2010 from 1:30p.m. - 3:00p.m.</p> <p>Nellie McClung Branch, Greater Victoria Public Library</p>
<p>3/31/2010</p> <p>View more information</p>	<p>RoundTable event in Ottawa LOL ! - Harnessing the Power of Humour in Donor and Client Relationships</p> <p>March 31st, 2010</p> <p>Chimo Hotel Ottawa, ON</p>



<p>5/27/2010</p> <p>View more information</p>	<p>Gift Planning - All in a Day - Waterloo/Wellington</p> <p>May 27, 2010</p> <p>Waterloo/Wellington</p> <p>Four Points by Sheraton, Cambridge, Ontario</p>
<p>5/12/2010- 05/14/2010</p> <p>View more information</p>	<p>Join us at the Canadian Association of Gift Planners 17th Annual Conference in Edmonton! Festival of Dreams!</p> <p>The 17th Annual Canadian Association of Gift Planners (CAGP-ACPDTM) Conference is an educational conference for gift planners, fundraisers and professional advisors. The CAGP-ACPDTM 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>May 12-14th, 2010 Edmonton, Alberta</p>

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