

December 2011



CAGP • ACPDP™
CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DON'S PLANIFIÉS



A HOLIDAY MESSAGE FROM THE EXECUTIVE DIRECTOR

In keeping with the spirit of the season, I want to take the time to say “thank you” to all our volunteers – both local and national - who work hard throughout the year to bring great value to our CAGP-ACPDPTM members.

Did you know that CAGP is still primarily managed by volunteers? **Did you know....**

- Over 70 volunteers participate on National Committees (including the National Boar).
- There is an estimated 160 volunteers on 23 local RoundTable Committees across Canada.
- The CAGP-ACPDPTM Conference welcomes between 60 to 70 volunteer speakers every year.
- There are now five staff – including the Executive Director - employed at the National Office.



Did you know we could not do the work without all of you?
THANK YOU!

To all our volunteers and our members who work so hard throughout the year and who continue to support our work at CAGP-ACPDPTM - may you all have a peaceful holiday season and a well-deserved break. Happy Holidays!

Diane MacDonald
Executive Director

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DISCLAIMER

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For more information please contact:
Communications@cagp-acpdp.org

MESSAGE FROM THE NATIONAL BOARD OF DIRECTORS

Wanted - Board Members for CAGP-ACPDTM! We need YOU!



The Nominations Committee of the CAGP-ACPDTM Board of Directors invites all interested members in good standing to consider serving on the National Board of the CAGP-ACPDTM.

We'd like to share some thoughts from a few of our current Board Members on why they joined, what they feel can be accomplished, and why *you* should consider serving on the Board of CAGP-ACPDTM.

Ross Young, Strategy Wealth Advisors: We are at a critical point in CAGP's evolution. It's an exciting time to be involved with shaping the future of our organization.

Roger Lee, Davis LLP: We need the input of new board members to help us keep perspective and challenge our thinking and assumptions.

Malcolm Berry, SickKids Foundation: What I enjoy most is taking ownership to help define the future of philanthropy in Canada, and collaborating with other stakeholders who wish to accomplish the same.

Darren Pries-Klassen, Mennonite Foundation of Canada: I enjoy being part of an intelligent and committed group of people determined to make gift planning the best it can be.

Charles O'Neil, QEII Health Sciences Centre Foundation: It's an opportunity to influence the strategic direction of an organization that has the potential to be a driving force for change in the charitable sector. As a CAGP member, I have received so many benefits and advantages over the years that I felt a responsibility to give back.

Peggy Killeen, Royal Victoria Hospital Foundation: I really believe in the power of this organization. It provides an incredible service to its members as well as to gift planning and philanthropy in Canada. I want to be part of taking us to the next level of excellence.

Help us define the future of CAGP and philanthropy in Canada!

Board Nominations

The deadline for nominations is **January 13, 2012**. Please click [here](#) for details on the process and the nomination form. For further information, contact Kat King (Project Assistant, National Office) 888-430-9494 ext.5 or projectassistant@cagp-acpdp.org.

Friend of CAGP/Ami(e) de l'ACPD award nominations

The deadline to nominate a candidate for the award is February 10th, 2012. If you wish to nominate a candidate for this prestigious award, please [click here](#) to access the form.

CRA NEWS

- [Consultation on Proposed Guidance on Arts Organizations and Charitable Registration under the Income Tax Act](#)
- [Charities Connection No. 9 - November 2011](#)

ANNOUNCEMENTS

- The Standing Committee on Finance is going to undertake a [study on charitable donations](#) immediately following the pre-budget consultations. CAGP-ACDPD™ is hopeful that we will be asked to participate or consulted as part of the study.
- [Conference 2012 Bursaries](#) are now available!
- Expression of Interest to become a CAGP-ACDPD™ Board member is now open! If you are interested in serving on the National Board, complete the form attached and the Governance Committee will be pleased to consider you in its recommendation for the slate. Please [click here](#) to fill out the form.
- The 2011 Federal Budget includes several provisions, entitled “Strengthening the Charitable Sector”, that will be of significance to the charitable sector. One of the most significant of these changes is the introduction of provisions rendering certain individuals to be ineligible to serve on the board of or in a senior capacity within a registered charity. If this provision is not followed then the charity may have its charitable status refused or revoked or may have its authority to issue charitable receipts suspended. (See [page 2](#))

A WARM WELCOME TO THE FOLLOWING MEMBERS WHO ARE NEW TO CAGP-ACDPD™

First Name	Last Name	Business Organization	Job Title
Alain	Beauchamp	Les Services Financiers Beauchamp	Assureur-Vie Agrée - Plan. Fin.
Christine	Boucher	Sedna Inc	Coordonnatrice développement et conseillère en sécurité financière
Cindy	Smith	Care Canada	Manager, Donor Development (Legacy)
Dianna	Cook	Portage College	Director of Development

Douglas	de Savoye	L.D. de Savoye & Co. Ltd.	President
George	Yap	Watercan/Eauvive	Executive Director
Helene	Sabourin	Canadian Nurses Foundation	Executive Director
James	Barnett	UOIT	Senior Major Gifts Officer
Jean	Comeau	Mécénat Marketing	Président
John	Nixon	Roman Catholic Archdiocese of Vancouver	Director of Development
Lucie	Brodeur	UNICEF	Executive Director (Acting)
Sandy	Allen	CAGP Manitoba RoundTable	Administrative Assistant

PROFESSIONAL DEVELOPMENT

CONGRATULATIONS TO OUR OCTOBER ORIGINAL COURSE GRADUATES!



[Click here](#) for a list of course graduates

Kicking off CAGP's **Webinar** Series!

Register Now!

[Click here](#) to register and to learn more about the upcoming webinar sessions

Next CAGP-ACPDTM Canadian Gift Planning Course

Register Now!

Taking place in Banff, AB from March 19th – March 24th, 2012

[Click here](#) for more information

CONFERENCE 2012



2012 CAGP-ACPDPTM Conference - April 18-20, 2012

The Fairmont Empress Hotel and Victoria Conference Centre, Victoria, BC

SAVE THE CONFERENCE DATES!

December 9th, 2011 – Registration Opens

Mark your calendar! Check your inbox! Conference registration is now open. Visit the [Conference webpage](#) to register today.

February 3rd, 2012 – Conference Bursaries

Last day to submit a [Bursary Application form](#)

February 24th, 2012 – Early Bird

Don't miss the early bird rate. Register by February 24th, 2012.
Members: \$710.00. Non-members: \$999.00.

March 17th, 2012 – Book Your Room

Book your room before March 17th, 2012. After this date the rate and hotel rooms are not guaranteed.

If you book by March 17th at the Fairmont Empress as part of the CAGP-ACPDPTM Conference, you will be eligible to win a complimentary Fairmont room or an upgrade to a Harbour View Deluxe room



Photo: Susie Dancer, SALTS Sail and Life Training Society



Helping Canadians LEAVE A LEGACY™*

CAGP-ACDPD™ recommends these simple steps to Canadians who are looking to leave a legacy gift in their will as a living reminder of their devotion to their community or their support for a cause.

1. **When preparing a will, choose a charity that is close to the heart.** “Consider if you or someone you know has benefited from the service of a particular organization, or perhaps you’re an active volunteer who believes in the mission and values of a specific group.” says Diane MacDonald, Executive Director of CAGP-ACDPD™. The LEAVE A LEGACY™ website has a “Find a Charity” database which provides a free and easy way to locate a charitable organization that you believe in.
2. **Seek the advice of a professional advisor who can provide guidance on charitable giving.** “A professional advisor will help you understand the tax incentives associated with legacy giving and will help you determine how much you can afford to give to your preferred charity.” says MacDonald. The “Find an Advisor” tool on the LEAVE A LEGACY™ website can help you locate a professional advisor in your area that can help you plan a charitable gift.
3. **Make sure that your family members are aware of your intentions.** By doing so, you can assure that they support the achievement of your charitable goals. You will need to leave clear instruction with your family, and in your will, that the gift be given in memory of a particular person or for a specific cause.

Canadians can plan a legacy gift regardless of their current assets or income. Leaving a legacy provides them with the opportunity to support a cause they believe in, often in ways they may not be able to do in their lifetime.

Follow LEAVE A LEGACY™ on [Twitter!](#)

For more information about [leavealegacy.ca](#) or the LEAVE A LEGACY™ program, please contact: leavealegacy@cagp-acdpd.org

*This text was adapted from the [legacy piece](#) on ReadersDigest.com.



CAREER CORNER

Do you need to make a new hire for 2012?

Then consider CAGP-ACPDTM's Job Posting Services!

For the Month of **DECEMBER** you can pre-purchase 2 services of your choice and receive the 3rd one for FREE! Save your HR department **Hundreds of Dollars** with this **Special Holiday Offer!** Contact Richelle at education@cagp-acpdp.org for more details!



Our current job postings:

[Manager Alumni and Advancement Services](#) – Red Deer College

For information on costs and services available, please [click here](#).
To view all current postings, please [click here](#).

Did you know that all of our job postings are Tweeted? Follow [@CAGP_ACPDP](#) for the latest job posting Tweets.

CAGP-ACPDTM Q&A



Q: Is there an easy way for an older donor to donate paper share certificates to a charity and receive a tax receipt?

A: Gifting publicly traded securities is straightforward. The donor assigns the securities to the charity through a prescribed form provided by his broker. **If the donor has the**

actual certificates, he or she signs the back of the certificate and has the signature guaranteed by their bank or broker. Charities need to be careful with endorsed stock certificates, or certificate accompanies by a properly endorsed stock power, as they are fully negotiable (have street value) and need to be safe guarded until deposited in a financial institution. Only licensed agents through prescribed dealerships and brokerage houses can trade these securities. Thus, it is important that the recipient charity have a brokerage account established in order to accept the securities. To expedite the transfer of the security, the charity may wish to open an account at the same institution as the donor.

What do you think about this answer? Would you propose something different? Start the conversation online on the [CAGP-ACPDTM LinkedIn group](#).

INTERESTING LINKS

Donations bounce back after two-year lull, but age of givers stubbornly high – Globe and Mail

Donations to charities are bouncing back after two years of recession, but the weight of philanthropic giving still rests on the shoulders of older Canadians. Statistics Canada data released Monday show that tax filers claimed donations of just under \$8.3-billion in 2010, up 6.5 per cent from 2009.

Give it up for charity - Globe and Mail

Besides the widely-known annual charitable giving campaigns, there are other ways for high-net-worth Canadians to support their favourite charities.

Economy isn't deterring Canadians from donating money - CTV.ca

Market volatility and a tough economy aren't deterring most Canadians from digging deep to support charitable causes, a new study suggests.

Clever ways to get more from charitable donations - Globe and Mail

Planned giving can be a great way to maximize your donations and also benefit at tax time, both now and in the future.

ROUNDTABLE EVENTS

Manitoba RoundTable/AFP Event

Thursday, December 15, 2011, 11:30 a.m. - 1:30 p.m.

Ask the Experts Panel

Leslie Weir, ACFRE, Director of Family Philanthropy - The Winnipeg Foundation

Beth Proven, CFRE, Manager, Planned Giving – University of Manitoba

Genevieve Delaquis, CFRE – Director of Advancement - Balmoral Hall School

Ron Bailey, CFRE - President, AFP Manitoba Chapter – Moderator

Waterloo RoundTable Event

Thursday, January 19, 2012, 11:30 a.m. - 1:30 p.m.

Life Insurance and Planned Giving – Key Strategies and How To Market It!

Michelle Garst

GTA RoundTable Event

Tuesday, January 19, 2012, 8:00 AM - 9:30 AM

Talking Gift Planning -Ten Tips for Better Donor Conversations

Malcolm D. Burrows (Head, Philanthropic Advisory Services, Scotia Private Client Group)

Saskatchewan North and South Round Event

Wednesday, February-15-12 8:30 AM - 4:00 PM

2012 CAGP Saskatchewan Workshop

London RoundTable

Tuesday, January-10-12 11:45 AM – 1:30 PM

Giving more than you've got; Life Insurance as a Planned Giving Tool

Ryan Fraser, CFP CIM, Director of Business Development, Freedom 55 Financial and co-Branch manager, Quadrus Investment Services Limited

Niagara/Golden Horseshoe

Thursday February-09-12, 7:30 AM – 9:00 AM

Tips on how to promote planned gifts using LAL National Resources

Catherine Hurley, President, LEAVE A LEGACY

