

November 2011



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



REPORT FROM THE EXECUTIVE DIRECTOR

As National Philanthropy Day approaches, I feel it is only fitting that I share my experience of the wonderful work that took place this fall at the CAGP Original Course, as well as the Advanced Course which takes place every second year.

As I reflect on my travels at the courses this fall, I am reminded of the many comments the delegates made in reference to their learning sessions:

Tax Aspects – *“I did not realize that gift planning included current gifts. This opens a whole new world.”*

Gifts of Life Insurance – *“I called my office this morning and told my administrator to hold all our life insurance policies until I return to the office!” “Even if I am a life insurance broker, it opens a lot of possibilities and added new knowledge to what I knew before.”*

Charitable Bequests – *“The knowledge I’ve learned so far has saved my organization thousands of dollars.”*

Marketing – *“I was not looking forward to the Marketing Module of this course, but it turned out to be one of the most valuable sessions for me and my organization.”*

Overall Course – *“This has been by far the best course I have ever attended. I consider this to be a life-changing experience in my professional world. I fell in love with planned giving, CAGP and look forward to fostering my relationship with the faculty and my student colleagues.”*

I sincerely hope that every CAGP-ACPDPTM member has the opportunity to attend the CAGP-ACPDPTM courses. In addition to the courses, members have complimentary access to *Planned Giving for Canadians, A Charitable Guide to Planned Giving* and *planforgifts.com* – a value that is worth more than the membership fee! CAGP-ACPDPTM also provides resources on statistics, gift planning articles, marketing materials, government relations and other supportive services such as *Ask an Advisor*. As well, your local RoundTable provides

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DISCLAIMER

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

workshops, seminars and opportunities to meet fellow CAGP-ACPDPTM members in your area.

More importantly, CAGP-ACPDPTM is a community of sharing. You are never alone at CAGP-ACPDPTM - contact a member today and you will see!

Happy Philanthropy Day!

Diane MacDonald
Executive Director, CAGP-ACPDPTM

MESSAGE FROM THE NATIONAL BOARD OF DIRECTORS

What makes a good friend?

Some key qualities are: loyalty, commitment, the ability to listen and to give good advice. A true friend is someone who always has your best interests at heart.

Doesn't that also sound like the description of a good gift planner?

We're probably biased, but we think that gift planners are special people. And like good friends, there are some who go above and beyond the call of duty, and deserve to be recognized. That's why we created the ***Friend of CAGP/Ami(e) de l'ACPD*** award in 1997 to celebrate outstanding personal contribution to our organization.

Each year a "Friends Committee" of the Board of Directors is established to consider candidates for this prestigious award at the annual conference. Please help us by letting us know if there is an individual or organization who you feel has made us proud by having:

- 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

In the past fourteen years, 28 individuals have been recognized. This list includes a truly broad cross section of planned giving champions, reflecting the growth and evolution of our organization. A summary of the award and a list of all recipients can be found under the [Friend of CAGP](#) tab on the website.

Besides sending us nominations for the award, we'd also like to have your input on how we can improve this program. For example, an area for consideration that may have been overlooked is the opportunity for local Roundtables to develop their own recognition programs to acknowledge contributions made at a local level. This is good work for RoundTables, but if we can act as a catalyst for support, we will.

We welcome all your feedback as well as your nominations for Friends! Please contact us at board@cagp-acpdp.org

Submitted by the Friends Committee, CAGP Board

NATIONAL BOARD-CALL FOR EXPRESSIONS OF INTEREST

The Canadian Association of Gift Planners/Association canadienne des professionnels en dons planifiés invites all interested members in good standing to consider serving on the National Board of Directors. We are looking for strong strategic thinkers who are committed to moving our association forward under the policy governance model.

If you are interested in serving on the National Board complete an “Expressions of Interest” form and the Nomination Committee will be pleased to consider you in its recommendation for a slate. This form is available on our [web site](#) or from the national office. All expressions of interest or nominations must include a 100-word biography and 200 – 250 word profile on your relevant experience and interests.

Deadline for submission - January 13, 2012

For further information, contact Kat King (Project Assistant, National Office) 888-430-9494 ext.5 or projectassistant@cagp-acpdp.org

ANNOUNCEMENTS

- The Ottawa LEAVE A LEGACY™ program recently launched its [website](#). Great work!
- We are pleased to announce that Jan Belanger, Assistant Vice-President, Community Affairs with Great-West Life, London Life and Canada Life (our LEAVE A LEGACY™ National Development Sponsor) recently presented a session to the Saskatchewan South Roundtable. This session entitled *Leave a Legacy™ Why it's important to Canadians and the Volunteer Sector* was a great success! It is our hope that her presentation will be used as a template by Great West Life, London Life and Canada Life representatives when presenting to RoundTables in the future. If you would like more information on hosting a similar session at your RoundTable, please contact Dominique - communications@cagp-acpdp.org.
- The new [Canada Not-for-Profit Corporations Act](#) (the “CNCA”) is in force as of October 17, 2011. The act applies to all federally incorporated not-for-profit organizations and gives them 3 years to transition to the CNCA. From now on not-for-profit organizations will be incorporated under the CNCA.
- For the first time in the history of the Committee’s pre-budget consultation process, the text of all briefs submitted to the committee will be published on the Committee’s [web site](#). The CAGP-ACPD™ brief is included in this list.
- The Government of Canada is looking at changing the way it finances charities and non-profit organizations to increase accountability of these organizations and to change public expectations. The October GR Information Bulletin [now available!](#)

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

First Name	Last Name	Job Title	Business Organization	RoundTable
Robert	Baker	Director of Stewardship Development	Christ Church Calgary	Southern Alberta
Eve	Beauchamp	Conseillere en developement Philanthropique	HEC Montreal	Greater Montreal
Kori	Brus	Philanthropic Counsel	Good Works	Greater Toronto
Judy	Dores	President	Charitable Legacy Insurance	Niagara/Golden Horseshoe
Kevin	Harper	Administration Manager	Toronto Rehab Foundation	Greater Toronto
Catherine	Hindson-Cox	Development Officer, Major Gifts	SickKids Foundation	Greater Toronto
Marian	Johnson	Planned Giving Officer	Sunnybrook Foundation	Greater Toronto
Stephen	Keys	Finance Director	ADRA Canada	Greater Toronto
Richard	LeBlanc	Projects Administrator	Roots of Change Foundation	Southern Alberta
Rong (Lauren)	Liang	Associate Lawyer	Clark Wilson LLP	Greater Vancouver
Jodi	Maroney	Manager, Community Relations	Community Living Chatham-Kent	Chatham-Kent
Jody	Maskery	Director Advancement Services	University of Windsor	Windsor and Essex County RoundTable
Susan	McAlevy	Executive Director	Abbotsford Community Foundation	Greater Vancouver
Marlena	McCarthy	President	Done Write Communications	Greater Toronto
Carmen	Murphy	Development Manager, Individual Giving	Vancouver Opera	Greater Vancouver
Helene	Nicholson	Manager of Community Investment	Kerby Centre	Southern Alberta
Carmen	Poudrier	Conseillere en Securite Financiere	Auotmome	Mauricie
Matthew	Pupic	Director, Finance and Development	Project Ploughshares	Waterloo-Wellington
Barbro	Stalbecker-Pountney	Barrister & Solicitor	B.E. Stalbecker-Pountney Barrister & Solicitor	Greater Toronto
Mandy	Walsh	Development Director	Oakville Hospital Foundation	Greater Toronto
Carol	Wladyka	Special Giving Officer	YWCA Toronto	Greater Toronto

PROFESSIONAL DEVELOPMENT

CONGRATULATIONS TO OUR ADVANCED GIFT PLANNING COURSE GRADUATES!

Banff, AB September 20th – 25th, 2011



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

CONFERENCE 2012



SAVE THE DATE!

[2012 Annual CAGP-ACPD™ Conference - April 18-20, 2012](#)

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

Thank you to the following RoundTables for sponsoring Conference 2012 bursaries:

Southern Alberta RoundTable
Saskatchewan South RoundTable
Vancouver Island RoundTable
Niagara/Golden Horseshoe RoundTable



Is your organization a LEAVE A LEGACY™ partner? Organizations are invited to “partner” with their local LEAVE A LEGACY™ Committee. What does partnership entail?

By endorsing the LEAVE A LEGACY™ program, organizations can help raise awareness about the importance of making a gift from an estate to charity. The ultimate outcome is an increase in estate gifts that support the work of charities, the work that enriches all our lives in all of our communities.

Participation in LEAVE A LEGACY™ offers you and your organization the opportunity to:

- Connect with our nation’s growing charitable giving community
- Gain more media exposure and recognition
- Access opportunities for professional development and networking
- Improve communication with donors about planned gifts
- Increase your ability to acquire future gifts
- Collaborate with estate and financial planning professionals
- Use LEAVE A LEGACY™ brochures and other materials provided by your local program, to promote your planned giving program
- Use LEAVE A LEGACY™ logos on materials

LEAVE A LEGACY™ programs across Canada offer a variety of customized benefits including:

- Hot link to the LEAVE A LEGACY™ local website
- Listing in LEAVE A LEGACY™ local promotions
- Opportunities to appear in annual newspaper supplements
- Receiving survey results
- Access the “participant only” areas on the web site with tools to assist allied professionals and charities in their gift planning endeavours
- Access to local Speaker Bureaus

To partner with a local LEAVE A LEGACY™ Committee you will have to contact the chair of the LEAVE A LEGACY™ Committee you wish to partner with. As each committee is adapted and unique to their community the process of partnering might vary. Some committees require a partnering fee or sponsorship fee and the fee varies based on the awareness activities of the local program. Please click [here](#) for a list of LEAVE A LEGACY™ local program Chairs.

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

For more information about leavealegacy.ca or the LEAVE A LEGACY™ program, please contact: leavealegacy@cagp-acpdp.org

CAREER CORNER



Did you know that CAGP-ACPDTM offers a Job Posting service on our website? Not only are you able to post a job, you are also able to view current postings.

Our current job postings:

[Manager of Planning & Communications](#) - Jewish Foundation of Manitoba

[Managing Director](#) - Cumberland Health Care Foundation

[Manager, Capital Donations and Personal Giving](#) - Perth & Smiths Falls District Hospital

[President](#) - Starlight Children's Foundation

For information on costs and services available, please [click here](#).

To view all current postings, please [click here](#).

CAGP-ACPDTM Q&A



Q: I've heard the amount of 20% of funds raised. Is that a legal requirement or a target to shoot for? We receive some funds specifically for admin, and would like to allocate 10% of all other funds raised to admin, and I want to make sure that this is legitimate.

A: What is proposed is absolutely permissible. CRA uses a reasonableness measure to ensure that a charity is in fact doing charitable work. While there is not specified legal limit

to administrative costs, the old 80-20 DQ rules, along with CRA's fundraising guidelines, gives the impression that 20% administrative costs is the acceptable range. It could certainly be higher depending on the organization, but reasonableness and true charitable activity is the CRA measurement. Then of course there is public acceptableness, and for that one would look to the administrative costs for like organizations.

Here is the link to the CRA Fundraising Guidance.

<http://www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/cps/cps-028-eng.html>

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

INTERESTING LINKS

- [The Inevitable](#) – Leader Post (Mention of LEAVE A LEGACY™)
- [Wills and estate plans can be used to support charities](#) – Forever Young Newspaper (Mention of LEAVE A LEGACY™)
- [Leave a legacy for generations with a bequest gift to charities](#) – Charlotte Observer (Mention of LEAVE A LEGACY™)
- [Composer Ann Southam leaves legacy gift of over \\$14 million to Canadian Women's Foundation](#) – Digital Journal
- [BMO Study: Most Canadian Boomers Have A Will, But Do They Have a Way?](#)
- [What happens to RESPs when Grandma dies?](#)
- Nonprofit Organizations Get Free Web Presence Boost from [Canadian Directory LocalHood.ca](#)

ROUNDTABLE EVENTS

[Formation - table ronde de l'Est du Québec](#)

Vendredi le 4 novembre de 9h -16h

Tout ce qu'il faut savoir pour mettre en place et développer un programme de dons planifiés solide

[Greater Montreal RoundTable Event](#)

Wednesday, November 9th, 2011, noon - 1:30 p.m.

Planned Giving Metrics (English)

[London RoundTable Event](#)

Friday, November 11, 2011, 11:45 a.m. - 1:30 p.m.

Philanthropic Advisory Services Integrating wealth, Philanthropy, and Family Harmony

[GTA RoundTable Event](#)

Thursday, November 17, 2011, 8:00 AM - 9:30 AM

Talking to Your Clients About Philanthropy

[Nova Scotia RoundTable Event](#)

Thursday, November 24, 2011, noon

"Making the Call"

[GTA RoundTable Event](#)

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

Talking Gift Planning -Ten Tips for Better Donor Conversations