



CAGP

PLANNER

ACPD

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Report from the Executive Director "Networking through social media"

Some of you may recall that CAGP-ACPD™ made the leap into social media for our annual Conference in Toronto. This proved to be an excellent way to promote the event and enabled us to receive member feedback in real time! In fact, we received such a positive response that we decided to add various social media tools to our communication efforts.

The CAGP-ACPD™ social media accounts are a great way for CAGP-ACPD™ members to network with each other, regardless of their geographical location. They allow members to participate in discussions and share their knowledge and ideas. We also look forward to using this as an opportunity to position CAGP-ACPD™ as a credible leader and resource for gift planning online, just as we are offline. We will do so by sharing information with you on a more regular basis. Not only will our social media accounts enable us to create stronger ties with our members, but it will also enable CAGP-ACPD™ to develop relationships with political leaders, media, donors and various charitable organizations.

We are happy to announce that our Twitter accounts are growing and hope that you will join the conversations. In order to meet the specific needs of our members, we have created three different accounts.

For general information on all things related to CAGP-ACPD™ follow [@CAGP_ACPD](#). Here you will find frequent updates related to membership, education, media coverage, local RoundTables and job postings.

For 2012 Conference news, make sure to follow [@CAGP2012](#). It is here that you'll find timely information about the upcoming Conference in Victoria.

Finally you'll want to take a look at [@CAGP_ExecDir](#) for Tweets related to planned giving and philanthropy provided by Diane MacDonald.

The CAGP [Linkedin](#) group is only available to members. Here you can connect with and keep in touch with other CAGP-ACPD™ members.



Those members who are already part of this group (over 300 of them!) are actively asking questions, sharing information and starting discussions about gift planning.

Facebook is another great way to keep in touch with other CAGP-ACPDPTM members. By “liking” [CAGP on Facebook](#) you will get regular updates in the News Feed on your homepage.

We encourage your participation in our online networks and welcome your feedback. If you have any questions regarding any of the tools listed above or about social media in general, please contact CAGP-ACPDPTM Communication at communications@cagp-acpdp.org.

Diane MacDonald
Executive Director, CAGP-ACPDPTM

ANNOUNCEMENTS

New RoundTable in Quebec

We are pleased to announce and welcome a new RoundTable that was recently formed in Quebec - the Mauricie RoundTable. This new RoundTable has been created by: Suzanne Cusson (Chair), Jean-Michel Dubord (Secretary), and Robert Ladouceur (Treasurer).

Congratulations to the new Mauricie RoundTable!

Update to “A Charitable Guide to Planned Giving” ([Available](#) in the members only section of the CAGP-ACPDPTM website)

Budget 2011 amendments have been made including:

- ✓ Implementation of flow through security gifts.
- ✓ New definitions including: GRIP, LRIP, Eligible and Non-eligible dividends.
- ✓ Three presentations to CAGP-ACPDPTM RoundTables on tax and other matters (Resources Section).

CFRE recently updated their “Resource Reading List”

The books listed are those that were frequently used by item writers and reviewers during item development for this examination.

[Please click](#) here to view a PDF version of the reading list.

CRA NEWS

The following updates are now available on the Charities and Giving Web pages:

- ✓ [East Africa Drought Relief Fund](#): Information for donors and charities about the Government of Canada’s donation matching program and other ways to help with drought relief efforts in East Africa.



- ✓ [Charitable organizations outside Canada to which Her Majesty in Right of Canada has made a gift](#) enjoy the same "qualified donee" status as registered charities, meaning they can issue official donation receipts for gifts that then allow donors to claim tax relief and as qualified donees they can receive funds from registered charities.

CAGP-ACPDTM NATIONAL EDUCATION UPDATE – Classes are filling up!

The graphic features three columns of scenic images with text overlays. The first column shows a village on a hillside with the text 'MONT-TREMBLANT Sunday Sept. 11 – Friday Sept. 16'. The second column shows a snow-capped mountain peak with the text 'BANFF Sunday Oct. 16 – Friday Oct. 21'. The third column shows a sunset over mountains with the text 'BANFF Tuesday Sept. 20 – Sunday Sept. 25'. A curved banner at the bottom contains the text 'ORIGINAL GIFT PLANNING COURSES' and 'REGISTRATION NOW OPEN!'. The CAGP-ACPD logo is at the bottom right, with the text 'CANADIAN ASSOCIATION OF GIFT PLANNERS' and 'ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DOMS PLANIFIES' below it.

[Apply](#) for a Bursary to attend one of the upcoming ORIGINAL CGP Courses taking place this fall 2011! Deadline to submit your application for the September Course is August 5th! [Apply now!](#)

****New** AFP Members can now register for a CAGP Gift Planning Course during 2011 at the CAGP Member Rate!!!**

Registration for these [events](#) is now Open – do not delay and be disappointed!
For further information, contact education@cagp-acpdp.org.



SAVE THE DATE!
2012 Annual CAGP-ACPDPTM Conference - April 18-20, 2012
The Fairmont Empress Hotel, Victoria, BC



Are you interested in starting a LEAVE A LEGACY™ Program in your community?

Do you want to volunteer with your local LEAVE A LEGACY™ Committee?

If you are considering starting a LEAVE A LEGACY™ Program in your area, you should begin by understanding the structure of our 23 volunteer Committees:

LEAVE A LEGACY™ Programs are developed under direction of their local RoundTable and are established as a program of the RoundTable. The LEAVE A LEGACY™ Chair must be a member of the CAGP-ACPDPTM and have written permission from their local RoundTable to begin a LEAVE A LEGACY™ Program. All RoundTables and LEAVE A LEGACY™ Committees are volunteer driven.

The RoundTable will incorporate the new local LEAVE A LEGACY™ Program into their existing structure. Canadian LEAVE A LEGACY™ programs are the property of the CAGP-ACPDPTM, which holds the rights to the logo and the phrase LEAVE A LEGACY™.

If there is no local RoundTable in your area or you are interested in starting a Program, please contact the National LEAVE A LEGACY™ Coordinator for information on how to start a LEAVE A LEGACY™ awareness program in your community.

www.leavealegacy.ca

For more information, please contact leavealegacy@cagp-acpdp.org or 1-888-430-9494 x 3.



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

First Name	Last Name	Business Organization	RoundTable
Ron	Burke	Bow Valley College	Southern Alberta
Janet	Cranston	Reh-Fit Centre	Manitoba
Steve	Edmison	Edmison Financial Inc.	Vancouver Island
Robert	Gagliano	Canadian Cancer Society BC & Yukon Division	Greater Vancouver
Lynda	LeRoux	Chaleur Regional Hospital Foundation	Saint John
Mark	Loria	Victoria Conservatory of Music	Vancouver Island
Heather	McLean	Havergal College	Greater Toronto
Claudia	Metelsky	The Royal Conservatory of Music	Greater Toronto
Shannon	Moon	The Royal Conservatory of Music	Greater Toronto
Krista	O'Donnell	The Royal Conservatory of Music	Greater Toronto
Jocelyn	Thémens	Fondation de la Maison Michel-Sarrazin	Québec City (l'est du Québec)



CAREER CORNER

Did you know that CAGP-ACPDPTM 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. All postings must be related to planned giving.

Our current job postings:

[Senior Development Officer – Personal and Planned Giving](#), Carleton University, Ottawa, ON

[Associate Director – Alumni Relations](#), Sauder School of Business, Vancouver, BC

[Planned Giving Coordinator](#), Nature Conservancy of Canada, Western Region of Canada

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

CAGP-ACPDPTM Q&A

This months' CAGP-ACPDPTM Q&A is from a CAGP-ACPDPTM member:

Q: *Would a donor (wishing to make a gift in their Estate) pay less tax to CRA if executor sold the equities or just designated the beneficiary to specific shares of XYZ?*

A: A donor's estate will reduce its tax burden by donating appreciated public securities to charity rather than sell and donate the proceeds of said securities. The additional tax savings for the estate



comes from the elimination of capital gains when a bequest is made in specie (in kind) of appreciated public listed securities. A well drafted will gives the executor(s) the power to make distributions from the estate in kind.

Generally speaking, naming/designating specific shares for charity is not recommended as the donor's holdings will/may vary from the date the will is executed and the day of death. If this happens, the gift to the charity fails.

It is better to name an amount for the charity and give the appropriate powers to the executor ... and of course hire a knowledgeable executor to fulfill the duties.

Q: *Is it better to name an amount for the charity or a percentage?*

A: That depends on the donor. Many do % or share of the residue, others specific dollar amounts. Charities often get surprised with larger gifts when it is a % or share, so some charities promote that way of giving. Either way of making a charitable gift in a will can be satisfied with an in-kind gifts of securities - if the trustee is given such powers.

Note: CAGP –ACPDPTM notes that the member/organizations posing the question are responsible for verifying the advice provided within their independent counsel (legal, tax, etc...). CAGP-ACPDPTM advisors do their very best in offering their advice, sharing their experience and noting legislation but CAGP-ACPDPTM is not responsible for the outcomes or actions taken based on this advice.

If you wish to start or join a discussion on this month's Q&A, be sure to visit the [CAGP LinkedIn Group](#). Sign up and join your colleagues!

INTERESTING LINKS

Imagine Canada - [Statement on Charity Ranking Systems](#)

An increasing focus on accountability and desire for better information in the charitable and nonprofit sector has led to the emergence of third party rankings of organizations. Imagine Canada believes that ranking charities is not helpful to Canadians especially in the absence of evaluating the impact of their work. Imagine Canada does, however, believe strongly in the need for the sector to be transparent and accountable.

Charity Village – [Nonprofit Salaries: It SHOULD Be A Living](#)

A cynically titled Canadian Press (CP) story, "[Goodwill means good wages for Canadian charity employees](#)," made the rounds last week, focusing on how various senior level managers and support staff for some of the country's largest, most high profile nonprofits earn salaries in excess of six figures. CharityVillage®'s soon-to-be-released *2011 Canadian Charitable and Nonprofit Sector Compensation and Benefits Study* will provide a different look at how these salaries are distributed and a larger snapshot of where sector salaries are at across the board.

Charity Village – [Fundraising Q&A](#)

The question: A close friend of mine frequently makes significant gifts to her favourite causes. I sit on the board of a charity; how do I get her to support mine?

The response: Ask and you shall receive is a good place to start! However, don't expect an instant gift without doing your homework. That said, remember, people give to people they know and trust so it's an excellent place to start.