

June 2011

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Report from the Executive Director – “The Wave is Coming”

The month of June has brought us a nice surprise – a new **International Gift Planning Survey - ENVISIONING AND INVESTING IN LEGACY AND BEQUEST OPPORTUNITIES** - released this month.


Last October, some of you may recall CAGP-ACPD™’s participation, along with other sector organizations (AFP, PPP, EAPG, SOFII UK), in the development of this survey, spearheaded by CharityVillage and Give Green Canada. The survey was open to staff in the nonprofit sector including Executive Director/CEO's, Development or Advancement Directors, Fundraising and Marketing Directors, Gift Planners and/or Estate Administrators as well as Trust Officers at financial institutions.

The results of this survey confirmed our deepest belief - **that organizations that are investing in their gift planning programs and activities are seeing much better results.** Malcolm Burrows from Scotia Private Client Group shared his thoughts: "The focus on bequests may seem like a stale idea, but it could never be more relevant than it is today. **The wave is coming.** *Envisioning and Investing in Legacy and Bequest Opportunities* is a study that provides data and insights for charities to make the case to pursue the most important type of future gift: the bequest."

The survey results demonstrate organizations that *say thank you, dedicate staff and budgets* to gift planning programs and *actively market* their bequest program, are more likely to achieve success in their gift planning programs.

The barriers to a successful gift planning program includes: *lack of human resources, competition from short-term revenue sources, no "champion" within the organization, etc.* We encourage all CAGP-ACPD™ members to be that champion, to never give up because those organizations who dedicate time and resources to their programs will see strong returns on their investment. With the effort come great rewards!

[View the final survey results.](#)



Diane MacDonald
 Executive Director, CAGP-ACPD™

**If you have any questions about the survey, please contact Natasha van Bentum, CFRE, Give Green Canada by email: vanbentum@gmail.com.*



ANNOUNCEMENTS

GPIC News

We are pleased to announce that legacy giving specialist and long time CAGP Member **Helen DeBoer-Daggett** will be assuming the role of Editor of Hilborn's monthly newsletter *Gift Planning in Canada*, following the retirement of the current Editor, **John Webster Hochstadt**.

Helen is currently the Director of Development at Norfolk General Hospital Foundation and is well known among gift planning professionals. She has been a faculty member for CAGP's week-long Original Gift Planning Course since 2007, presents frequent seminars and conference sessions and serves on the CAGP Education Committee.

Congratulations Helen. We look forward to hearing from you in GPIC every month!

***Building Stronger Communities Together*[™] Initiative**

It is with pleasure that we learned this month that Great West Life, London Life and Canada Life have included CAGP-ACPD[™]'s LEAVE A LEGACY[™] initiative in their 2010 Public Accountability Statement, *Building Stronger Communities Together*[™]. It is indeed a great honour to have our LEAVE A LEGACY[™] Program listed amongst a number of carefully selected community programs across the country.

As our LEAVE A LEGACY[™] National Development Sponsor for the past eight years, Great-West Life, London Life and Canada Life continue to provide support and visibility for our LEAVE A LEGACY[™] message. CAGP-ACPD[™] is grateful for their support - enabling the development of stronger local LEAVE A LEGACY[™] Programs throughout Canada.

CFRE Certification

Please join us in congratulating the following CAGP members for successfully completing their CFRE certification:

- Janice St-Denis, Burlington, ON
- Peter Okonski, Toronto, ON

CRA NEWS

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

- [Registration for the June 8, 2011, Charities Information Webinar is now open.](#) This webinar will be on the T3010-1: Line by Line Review.
 - The Charities Directorate has created a [completed sample of the T3010-1](#), Registered Charity Information Return, in order to help small and rural charities meet their annual reporting obligations.
 - [Charities Connection](#) is an electronic publication that has replaced the Registered Charities Newsletter. This new electronic publication is more concise and gives registered charities information on technical issues, new guidance and policy changes, CRA initiatives, and reminders.
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CAGP-ACDP™ NATIONAL EDUCATION UPDATE

Original Canadian Gift Planning Courses Fall Line-up:

1. September 11 – 16, 2011, Sunday to Friday noon

Hotel du Lac, Tremblant, Quebec

Faculty: Michelle Osborne and Christopher JK Richardson

2. October 16 – 21, 2011, Sunday to Friday noon

Banff, Alberta

Faculty: Norma Cameron and DeWayne Osborn

ADVANCED Canadian Gift Planning Course 2011:

September 20 – 25th, 2011

Banff, Alberta

Faculty: Malcolm Burrows and Susan Manwaring

Registration for these events is now Open – do not delay and be disappointed!

Please contact Sharyon Smith at education@cagp-acdp.org for assistance or further information.

SAVE THE DATE!

2012 Annual CAGP-ACDP™ Conference - April 18-20, 2012

The Fairmont Empress Hotel, Victoria, BC

For more information on all CAGP-ACDP™ Educational offerings, [click here](#).



Congratulations to all of the RoundTables for hosting such outstanding events and activities throughout the Month of May.

Along with some excellent speaker presentations, we saw a wealth of information produced in the form of 16-page tabloids in magazines, 30-page supplements, advertisements in community newspapers, public forums, library series, strategically placed banners, and a 30-second radio ad.

Check out how we celebrate LEAVE A LEGACY™ [Month of May!](#)

For more information, please contact the National LEAVE A LEGACY™ Coordinator at leavealegacy@cagp-acdp.org or 1-888-430-9494 x 3.



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

First Name	Last Name	Business Organization	RoundTable
Phil	Allen	Lakeland College	Alberta North
Hendy	Andrews	International Needs	Niagara/Golden Horseshoe
Bruce	Bennett	Richardson GMP Limited	Manitoba
Hélène	Bertrand	The Council of Canadians	Ottawa
Jim	Biblow	Avid Financial Services Inc.	Southern Alberta
David	Boucher	McGill University Health Centre Foundation	Greater Montreal
Kathleen	Burton	Victoria Hospice	Vancouver Island
Lynne	Butler	Scotia Private Client Group	Alberta North
Jim	Byrne	St. Patrick's Mercy Home Foundation	Newfoundland
Deborah	Calviello	TD Waterhouse	PEI
Heather	Chisholm	United Way Ottawa	Ottawa
Mike	Clark	University of Windsor	Windsor and Essex County RoundTable
Kathryn	Dingle	Inter Pares	Ottawa
Benoit	Dulude	Services financiers Benoit Dulude Ltée	Greater Montreal
Ross	Dunlop	Cardinal Capital Management	Manitoba
Lisa	Gleva	York University	Greater Toronto
Gemma	Grey-Hall	United Way	Windsor and Essex County RoundTable
Donna	Hastings	Heart and Stroke Foundation of Alberta, NWT & Nunavut	Southern Alberta
Laura	Hastings	Laing House	Nova Scotia
Judy	Hopps	Bishop's College School	Greater Montreal
John	Jacobi	Terra Fund Management Ltd.	Greater Toronto
Elise Monaghan	Joubert	Cancer Research Society	Greater Montreal
Tara	Kardash	Child and Family Services of Western Manitoba Foundation	Manitoba
Tina	Keys	Seventh-day Adventist Church in Canada	Greater Toronto
Wayne	Kroeker	Canadian Council of Christian Charities	Waterloo-Wellington
Trudy	Loo	St. Paul's Hospital Foundation	Greater Vancouver
Tessa	MacDougall	Sun Life Financial	Greater Vancouver
Peter	Marshall	The Gideons International	Greater Toronto
Mary	McPherson	The Credit Valley Hospital Foundation	Greater Toronto
Tammy	Morison	North Bay Regional Health Centre Foundaton	Greater Toronto
Louise	Morton	Archdiocese of Ottawa	Ottawa



First Name	Last Name	Business Organization	RoundTable
Jen	Panteluk	Ronald McDonald House Northern Alberta	Alberta North
Judi	Price-Rosen	Jewish Federation of Winnipeg	Manitoba
Christine	Rier	House of Friendship	Waterloo-Wellington
Graham	Robson	Cardinal Foundation	Manitoba
Julie	Rodgers	Ontario Federation of Anglers & Hunters	Quinte (Belleville)
Danielle Gabrielle	Roy	Fondation Héma-Québec	Greater Montreal
Ed	Sharpe	Maritime Conference - SDA Church	Saint John
Christine	Sigouin	Montfort Hospital Foundation	Ottawa
Lauren	Smith	Ontario Lung Association	Greater Toronto
Chris	Steeves	The Halifax Grammar School	Nova Scotia
Donald	Stephenson	Habitat for Humanity Niagara	Niagara/Golden Horseshoe
Patricia	Valleau	Hotel-Dieu Grace Hospital Foundation	Windsor and Essex County RoundTable
Hélène	Véronneau	Fondation de l'Institut de recherches cliniques de Montréal	Greater Montreal
Marion	York		Greater Toronto



CAREER CORNER

Did you know that CAGP-ACDP™ 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 Major Gifts Officer](#), University of Ontario Institute of Technology, Oshawa, Ontario

[President](#), Starlight Children's Foundation (Canada), Markham, Ontario

[Manager of Donor Relations](#), Jewish Foundation of Manitoba, Winnipeg, Manitoba

[Donor Engagement Officer- Major Gifts and Planned Giving](#), Doctors Without Borders, Toronto, Ontario

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



CAGP-ACPDPTM UPCOMING JUNE EVENTS

[Manitoba RoundTable Event](#) - *After the Tea is Poured*

Date: Thursday, June 9, 2011

Time: 11:30 a.m. - 1:30 p.m.

Speaker: Derek McLean, CFRE

Cost: CAGP-ACPDPTM Members and AFP/AHP Members: \$30 / Non-members: \$45

[London RoundTable Event](#) - *Charity Law Highlights with Terrance S. Carter*

Date: Friday, June 10, 2011

Time: 11:45 a.m. - 1:45 p.m.

Speaker: Terrance S. Carter, B.A., LL.B., TEP

Cost: CAGP-ACPDPTM Members: \$25 / Non-members: \$40

[Niagara/Golden Horseshoe RoundTable Event](#) - *AGM: The Spirit of Giving*

Date: Tuesday, June 14, 2011

Time: 11:45 a.m. - 1:30 p.m.

Speaker: Terry Cooke, President & CEO of Hamilton Community Foundation

Cost: CAGP-ACPDPTM Members: \$35 / Non-members: \$40

[Greater Montreal RoundTable Event](#) - *Coups de coeur de la conférence de l'ACPDPTM de 2011 à Toronto et Assemblée annuelle de la Table ronde du Montréal métropolitain*

Date: Wednesday, June 15, 2011

Time: Noon

Speakers: Various delegates from the 18th Annual National CAGP-ACPDPTM Conference in Toronto will be speaking about their favourite moments

Cost: CAGP-ACPDPTM Members, Gold Associates and Students: \$30 / Guests: \$50

[Greater Vancouver RoundTable](#) - *To Bequest or Not to Bequest, That is the Question*

Date: Thursday, June 16, 2011

Time: 7:30 a.m. - 9:30 a.m.

Speaker: Doug Puffer, Simon Fraser University

Cost: CAGP-ACPDPTM Members: \$30 / Non-members: \$40

[Southern Alberta RoundTable Event](#) - *CAGP Solstice Social*

Date: Tuesday, June 21, 2011

Time: 4:00 p.m. - 7:00 p.m.

This is a social event! CAGP-ACPDPTM Members, Gold Associates, those interested in joining CAGP, Leave A Legacy™ friends, co-workers, and fundraising colleagues, are all welcome!

Cost: \$10 per person

[Greater Toronto RoundTable Event](#) - *Where There's a Will, There's a Relative*

Date: Thursday, June 23, 2011

Time: 12:00 p.m. - 1:30 p.m.

Speaker: Patricia Lovett-Reid, Senior Vice-President, TD Waterhouse

Cost: CAGP-ACPDPTM Members and Gold Associates: \$55 / Non-members: \$70

18th ANNUAL NATIONAL CAGP-ACPDTM CONFERENCE PRIZE WINNERS

Congratulations to the following prize winners at our Conference in Toronto!

Company	Exhibit Prize	Prize Winner
CAGP-ACPD TM Exhibit Game	2012 Conference Registration	Lorelei Wilkinson
CAGP-ACPD TM Exhibit Game	CAGP-ACPD TM one year membership	Chris VanderKruys
CAGP-ACPD TM Exhibit Game Bonus	CAGP-ACPD TM one year membership	Michelle Grzebien
CharityVillage.Com	5 Course E-Learning Bundle	Melanie C. Riley
Investors Group	Choice of either 8G iPod touch or Wii	Shelley Schaubel
Leave a Legacy	iPod Shuffle	Paulette Sweeney-Goodwin
MacKenzie Investments	Wine Collection Set	Patti Johnstone
MacKenzie Investments	Bamboo Tea Box with assorted teas	Heather Hamilton
Miller Thomson LLP	Kobo E-Reader	Lucille Grimard
PGGrowth	Books on Philanthropy and Planned Giving	Mike Strathdee
PlanGiv	Dinner and Movie Gift Certificates	Jeanette Kelly
ProDon/ Logilys	Bottle of Wine	Sue Hardy
RBC Wealth Management	iPad	Jill Nelson
Scotia Private Client Group	Autographed Maple Leafs Jersey	Charles O'Neil
Scotia Private Client Group	Canadian Who's Who	Liz Dobbs Jones
Target Analytics	Amazon Kindle	Crystal Montecalvo
TD Waterhouse	A Soldier First by General R. Hillier	Allen Schellenberg
TD Waterhouse	A Soldier First by General R. Hillier	Robert Fequet
TE Investments Counsel Inc.	Kobo E-Reader	Liz Dobbs Jones

**"If you find it in your heart to care for someone else, you will have succeeded."
~ Maya Angelou**

Stay tuned for more information on our 19th Annual National CAGP-ACPD Conference, April 18-20, 2012 in Victoria, British Columbia!

