

CAGP PLANNER ACPDP

August 2009 VOL 23 Number 6

In this Issue

- A NOTE FROM THE EXECUTIVE DIRECTOR
- CRA NEWS
- EDUCATION REPORT
- CONFERENCE 2010
- LEAVE A LEGACY™
- CAREER CORNER
- WELCOME NEW MEMBERS
- UPCOMING EVENTS AUGUST 2009

DISCLAIMER

The opinions expressed in this newsletter are those of the individual authors and do not, unless specified, necessarily represent the policies or standards of the CAGP-ACPDPTM.

The Planner is published regularly throughout the year by The Canadian Association of Gift Planners™. Reproduction of articles may not be carried out without permission of the Association. The Planner is available in English and French.

For more information please contact:

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

CAGP-ACPDPTM DEFINITION OF GIFT PLANNING:

Gift Planning is the donor-centered process of planning charitable gifts, whether current or future gifts, that meets philanthropic goals and balances personal, family, and tax considerations.

A NOTE FROM THE EXECUTIVE DIRECTOR

August 2009

Did you know?

Did you know that the majority of CAGP-ACPDPTM members who work within charities do not work in gift planning full-time? In fact, the opposite is true. The majority of members (47%) spend under one fourth of their time on gift planning. Most of our members (**84%**) **are part-time gift planners** in their charity.

What does this mean for CAGP-ACPDPTM?

For a part-time profession, your professional organization becomes an important resource – a “go-to” place - where there is assistance when you need it. Most of you are familiar with doing something part-time – be it a chore, a hobby or even your own banking. Once in a while you need some training but not constantly, right? And sometimes, you can use some focused training - even if it is once a year and even if it feels repeated. Why? In your work environment, you might only look at gift planning when time permits. So reviewing what’s new in gift planning is important – in order to stay informed and motivated in your gift planning activities. This is why we see so many members participate in local and national events. Often, they need to be reminded of the work they do – even part-time.

How does this affect our educational offerings?

CAGP-ACPDPTM strives to be the best resource, the best advocate, the best educator of gift planning in Canada. Did you know that all CAGP-ACPDPTM members have access to three web resources that provide legislation, policies and templates? The Members-Only section of the website provides a great resource for information you need for quick decisions and to confirm that you are on the right track.

We continue to **teach the tools** of gift planning - that is what makes us who we are. These tools were developed and lobbied for (by CAGP-ACPDPTM) for Canadians to use.



CAGP-ACPDPTM encourages members – both advisors and charities – to continue to provide awareness of the many choices that Canadians have.

We continue to **teach how to incorporate** gift planning in your charity or in your practice.

And we continue to **assist you with marketing** the LEAVE A LEGACY™ message.

Of course, we represent a lot more for many members. They continue their membership for the networking, the colleagues, the rich dialogue and the learning that goes on each time they gather for a local or national event. CAGP is truly a member-driven association and we are grateful for those members who actively participate in providing guidance and support throughout the years.

Diane MacDonald
Executive Director, CAGP-ACPDPTM

QUOTE OF THE MONTH

"I did not find the world desolate when I entered it. My fathers planted for me before I arrived, so I plant for those who come after me." - Talmud

CRA NEWS

August, 2009

[Canadians can now communicate directly with Minister Jean-Pierre Blackburn](#)

[The Canada Revenue Agency issues new guidance for charities on fundraising](#)

[Consultation on the Proposed Guidance on Activities Outside of Canada for](#)

[Canadian Registered Charities](#)

[Proposed Consumer Product Safety Act Raises Concerns for Charities](#)

CAGP-ACPDPTM NATIONAL EDUCATION UPDATE

ADVANCED Canadian Gift Planning Course

September 22 – 27, 2009

Whistler Village Delta Suites Hotel, British Columbia

Faculty: Malcolm Burrows and Susan Manwaring

YES – There are still a few spaces left! Register now to take advantage of this rare educational offering. [Advanced Course](#)

Offering both Advocis and CFRE continuing education credits. Approach 2010 strong and prepared with the latest information on:

- Tax Aspects of Gift Planning in Canada • Charitable Bequests & Endowments
- CRT's & Publicly Listed Securities • Charitable Gift Annuities
- Cultivation of Prospects • Gifts of Life Insurance • Advanced Planned Giving Topics
- Recognition of Donors • Stewardship • Marketing
- Starting a Gift Planning Program • Dealing with the Subject of Death
- Ethical & Liability Issues • Group Case Studies

NEXT Original Canadian Gift Planning Course

October 20 – 25, 2009

Banff Conference Centre, Banff, Alberta

Faculty: Brian Shea and Joshua Thorne

[Registration](#) is now open! Don't miss out! This is the last 2009 Original Gift Planning Course offering!

2010: Original Canadian Gift Planning Course

March 23 – 28, 2010

Banff Conference Centre, Banff, Alberta

Faculty: TBA

CAGP-ACPDTM Conference 2010- Save the Date!



The 17th Annual National CAGP-ACPDTM Conference will be held in Edmonton, Alberta from May 12th-14th. This year's conference will be held at the [Westin Edmonton](#).

We encourage you to visit www.CAGP-ACPD.org for more information about registration, accommodations and conference sessions.

Second call for session proposals

Deadline- Friday August 14, 2009

It's not too late! We are seeking specific session topics for the 2010 Annual National CAGP-ACPDTM Conference in Edmonton, Alberta.

Thank you to those who submitted to our first call for conference sessions. We

have received some excellent session proposals but noticed some gaps in certain topic areas. We are returning to our membership to invite you to review our list of proposed topic sessions which can be found [here](#).

Click [here](#) to submit a proposal

LEAVE A LEGACY™

The CAGP-ACPD™'s public awareness program, LEAVE A LEGACY™ has reached new heights in the last year with Canadians becoming more and more aware of our simple message – Make a Difference in the Lives that Follow.

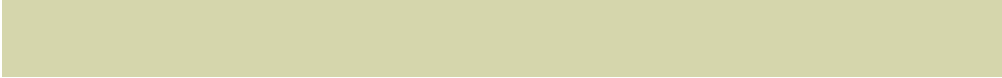
As you know, our National Development Sponsor, Great-West Life and London Life has assisted us to reach many of our goals by providing financial assistance to the National Office. In turn, we have provided funding to our local Committee. It is important to note that it is through the wonderful dedication of our volunteers on local LEAVE A LEGACY™ Committees that all the local messaging, promotion and hard work takes place.

Below is a list of all LEAVE A LEGACY™ Chairs across Canada. With recent changes to many RoundTable Executive Committees, we felt it would be appropriate to recognize not just the current LEAVE A LEGACY™ Chair, but also the outgoing LEAVE A LEGACY™ Chair. If you happen to cross paths with one of these passionate volunteers, make sure you give them a pat on the back!

RoundTable

LEAVE A LEGACY™ Chair(s)

Greater Vancouver	Kathy Mannas, Co-Chair kathy_mannas@can.salvationarmy.org Andy Wickey, Co-Chair awickey@suriya.ca
Central Vancouver Island (Nanaimo)	Zoë Campbell, Chair zcampbell@bccancer.bc.ca
Vancouver Island	Suzanne Dubé, Chair suzd@shaw.ca
Saskatchewan South (Regina)	Amanda Lanoway, Chair alanoway@unitedwayregina.ca
Saskatchewan North (Saskatoon)	Vicki Corbin, Chair vcorbin@abilitiescouncil.sk.ca Outgoing Chair: Susan Clarkson saskrmh@shaw.ca
Southern Alberta (Calgary)	Joan Weld, Chair Joan.Weld@td.com Outgoing Chair: Janelle Wakaruk janellew@cancerboard.ab.ca
Alberta North (Edmonton)	Carole Pickering, Chair carole.pickering@cnib.ca
Prince Albert and Area	Donna Strauss, Chair Familyfutures1@sasktel.net
Manitoba	Douglas Smith, Co-Chair douglas_smith@can.salvationarmy.org Kristine Betker, Co-Chair kbetker@rc.mb.ca
Eastern Ontario/West Québec (Ottawa & Gatineau)	Nadine Fowler, Chair Nadine@flagroup.ca
Niagara/Golden Horseshoe	Tamara Coleman-Lawrie, Co-Chair



(Hamilton/Burlington)	tamara.coleman-lawrie@wesleyurbanministries.ca Linda Syrota-Sullivan, Co-Chair linda.syrotasullivan@redcross.ca
Greater Toronto Area	Angela Murphy, Chair Magazine angela.murphy@sickkidsfoundation.com Paul Nazareth, Chair Community Outreach pnazareth@archtoronto.org
South Eastern Ontario (Belleville/Kingston)	Hazel Lloyst, Chair hllloyst@qhc.on.ca
Waterloo/Wellington	Janice Forsyth, Chair jforsyth@weareunited.com
Temiskaming	Peter R. Ramsay, Chair pramsay@ramsaylaw.ca
Montréal, Québec, Provincial	Lucille Grimard, Chair lucille.grimard@fmcoeur.qc.ca
Nova Scotia	Mary Theresa Ross, Chair mary.ross@iwk.nshealth.ca Outgoing Co-Chairs: Doris Cameron dcameron@kidney.ns.ca Gerry MacIsaac gmacisaac@avdha.nshealth.ca
Newfoundland Labrador	Craig Bishop, Chair craig.bishop@scotiastrust.com
London and Region	Don Gordon, Chair nod.gordon@rogers.com

If you are interested in LEAVE A LEGACY™ and would like to become more involved, please feel free to contact the LEAVE A LEGACY™ Chair in your area. You may also contact Jennifer Paradis, National LEAVE A LEGACY™ Coordinator at leavealegacy@cagp-acpdp.org or 1-888-430-9494 ext 3

CAREER CORNER

Planned Giving Officer  www.regent-college.edu For more information, click here	Posted: 07/24/2009 End: 08/23/2009 Location: Vancouver, British Columbia
Development and Communications Manager  For more information, click here	Posted: 07/24/2009 End: 08/08/2009 Location: Delta, B.C. (Ladner)

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



A WARM WELCOME TO THE FOLLOWING MEMBERS WHO ARE NEW TO CAGP-ACPDPTM OR HAVE RETURNED FROM A BRIEF PERIOD AWAY

First Name	Last Name	Business Organization	RoundTable
Patty	Bambrick	Alberta Children's Hospital Foundation	Southern Alberta
David	Bremner	Oxfam Canada	Greater Vancouver
Isabelle	Chagnon	Fondation Hôtel-Dieu Arthabaska	Greater Montreal
Jennifer	Clark	Whitby Mental Health Centre Foundation	Greater Toronto
Joy	Davidson	Arthritis & Autoimmunity Research Centre Foundation	Greater Toronto
Lloyd	Derry	Ducks Unlimited Canada	Southern Alberta
Bruce	Eyford	Victoria Beach Club	Manitoba
Barbara	Eyles	Capilano University Foundation	Greater Vancouver
Tara	Friesen	Athabasca University	Southern Alberta
Pierre-Francois	Monnier	Fondation HEJ-HSS	Quebec City (l'est du Quebec)
James	Nairne	Tacita Capital Inc.	Greater Toronto
Angela	Ottenbreit		Saskatchewan South
Linda	Reid	Environmental Defense	Greater Toronto
Sanish	Samuel	York University Foundation	Greater Toronto
Brigitte	Tschinkel	Grandview Children's Hospital Foundation	Greater Toronto
Bree	Urkow	University of Alberta	Alberta North
Tania	Vrionis	Langley Memorial Hospital Foundation	Greater Vancouver

CAGP-ACPDPTM UPCOMING EVENTS

<p>09/11/2009 View more information</p>	<p style="text-align: center;">Now more than Ever: Legacy Giving in Extraordinary Times</p> <p style="text-align: center;">September 11th, 2009, 11:45pm-1:30pm Windermere Manor, London ON</p> <p>Join us as we explore how donors, professional advisors and charity based gift planners can collaborate to develop and implement comprehensive gift plans that achieve donor's philanthropic aspirations. Even in challenging times, legacies can be created that make a difference in the lives that follow. <i>With featured guest:</i> <i>Joshua Thorne, Charitable Gift Planner</i> Registration opens July 31st, 2009</p>
--	---



<p>09/16/2009 View more information</p>	<p>The Winnipeg Foundation and the Faculty of Law are holding a half-day luncheon symposium on September 16th at the Hotel Fort Garry called</p> <p>Law, Philanthropy and New Economic Challenges: Changing the Rules of Engagement.</p> <p>Topics include: Charity Management and Fiduciary Responsibility Funding Challenges Facing Charities and Non-profits CRA Round table: Regulation in Challenging Times</p>
<p>09/22/2009 View more information</p>	<p>CAGP-ACDPD ADVANCED Gift Planning Course Whistler, BC</p> <p>CAGP-ACDPD™ is pleased to repeat one of its newest additions to their Educational offerings – The ADVANCED Canadian Gift Planning course. The ADVANCED Canadian Gift Planning course is aimed toward suiting the needs of both professional advisors and seasoned gift planners. Interactive and in-depth, the course provides a unique opportunity to explore the issues with experienced gift planners.</p>
<p>9/29/2009 View more information</p>	<p>Building Your Legacy With a Charitable Giving Fund Victoria, BC</p> <p>Tuesday September 29, 2009: 1:30pm to 3pm</p> <p>presented by Fran Davis and Angela Wright</p>
<p>10/20/2009 View more information</p>	<p>CAGP-ACDPD ORIGINAL Gift Planning Course Banff, AB</p> <p>The Canadian Gift Planning course, CAGP-ACDPD™'s week-long course, is the longest running and most respected course on Canadian philanthropy. Founded in 1990, this demanding comprehensive course provides in-depth education on the full range of gift planning issues: from detailed information on the tax aspects of gift planning to topics such as working with donors, program marketing, stewardship, and ethics.</p> <p>The course provides an unrivalled educational experience, balancing formal classroom learning, in-depth discussions, group work, and case studies.</p>

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