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A NOTE FROM THE EXECUTIVE DIRECTOR

November 2009

In consideration of National Philanthropy Day this month (November 15), I thought I would share some facts regarding Canadian Seniors.*

Important 'Age Wave' Facts

In Canada Seniors are the fastest growing segment of our population and currently they own 80% of the independent wealth in this country. In the coming years there will be the greatest transfer of wealth that Canada has ever known.

Canada will experience a phenomenon that will not happen anywhere else in the World. By 2016 there will be more people over the age of 65 than children under the age of 14.

People are living longer. The age difference between someone who has just entered what is termed their senior years (65 years of age), and an old senior, may be anything from 30 to 40 years. This is a huge age difference and there is an enormous disparity in the way in which these two seniors behave, feel, make decisions, and differ in their personal and business needs. These two seniors are also experiencing different phases of the aging process.

The first Baby Boomers are turning 60 years of age and when they become seniors they are going to revolutionize the way in which people are going to work and retire. These Grand Boomers will be vastly different from the current seniors.

The "Retirement Years" may be in excess of 35 years. Our seniors are facing numerous challenges and decisions with regard to; what lifestyle they desire, maintaining their home, how are they going to afford the basics and the luxuries, how are they going to cope physically, is health going to play a part, how many "care years" should they be preparing for, what about family and friends, the list is endless.

**With permission from the website of the Canadian Academy of Senior Advisors. <http://www.canadacsa.com/>*

Happy Philanthropy Day!

Diane MacDonald
 Executive Director, CAGP-ACPD™



QUOTE OF THE MONTH

If charity cost no money and benevolence caused no heartache, the world would be full of philanthropists.
Yiddish Proverb

CRA NEWS

November 2010

- [Minister Blackburn launches call for proposals to benefit charitable organizations](#)
- [The registration for the November 2009 Charities Information Webinars is now open](#)
- [My Business Account \(MyBA\) service is now available for charities' accounts](#)

CAGP-ACPDPTM NEWS

The Canadian Association of Gift Planners would like to acknowledge **Barry Bloom, CFRE, National Arts Centre Foundation**, as the recipient of the "Outstanding Fundraising Executive" award. The award was given out at the 15th Annual Philanthropy Awards presented by TELUS on Wednesday November 4th, 2009.

CAGP-ACPDPTM NATIONAL EDUCATION UPDATE

The Advanced Gift Planning Course was held in September in Whistler, BC. It was attended by 38 participants; here are some of their comments:

'Terrific intensive course for busy advanced professionals!'

'I would highly recommend this course to gift planners. Malcolm and Susan are dynamic facilitators with a thorough understanding of the relevant topics, and the challenges we face.'

'The Advanced Gift Planning Course truly benefits anyone who strives to be a better gift planner by imparting knowledge and best practices that is useful and practical with every interaction with a donor/client.'

'The Advanced Gift Planning course is excellent for experienced gift planners. I learned many new concepts that I will use in the next year and for years to come. The review of gift planning tools was valuable and the assignments and group work cemented the learning. The opportunity to mingle with other experienced gift planners was extremely helpful.'

Please join us in congratulating the following delegates:

Brian Altwasser
Sandra Bellisario
Natasha Benn
Michael Blatchford
Malcolm Berry

University of British Columbia
Easter Seals Ontario
University of Victoria
Bull, Housser & Tupper LLP
SickKids Foundation



Lorie Colledge
Marie-Anne Desjardins
Colleen DeJager
June Dryer
Alanna Donahue
Nicola Elkins
Calvin Fong
Don Gorsalitz
Michele Grzebien
Kathy Hawkesworth
Catherine Hurley
Dalit Hume
Ron Kelly
Jennifer Kroezen
Greta Luimes
Tony Lee
Teresa MacGillivray
Sheelagh Mercier
Elizabeth Moxham
Linda Netherton
Michelle Osborne
Charles O'Neil
Sandra Parkin
Doug Puffer
Milly P Siderius
Allen Schellenberg
Mike Strathdee
Keith Stam
Lauren Storer
Jim Traves
Neil Williams
Marcella Zanella
Isabela Zabava

CIBC Trust Corporation
Montreal
London Health Sciences Foundation
Compassion Canada
BC Children's Hospital Foundation
Benefaction Foundation
Vancity Community Foundation
Roman Catholic Diocese of Saskatoon
Foundation of Chatham-Kent Health Alliance
Edmonton Community Foundation
Hurley & Company Ltd. - Partners in Creative Philanthropy
St. John's Rehab Hospital Foundation
PlanGiv Capital Ltd
Easter Seals Ontario
Canadian National Christian Foundation
Canadian Cancer Society
RBC Dominion Securities
Alberta Children's Hospital Foundation
University of British Columbia
Heart and Stroke Foundation of BC & Yukon
University of Toronto
QEII Health Sciences Centre Foundation
Foundation of Chatham-Kent Health Alliance
Simon Fraser University
Canadian Council of Christian Services
Lutheran Foundation - Canada
Mennonite Foundation of Canada
The United Church of Canada
Scotia Private Client Group
University of Saskatchewan
SAIT Polytechnic
Nature Conservancy of Canada
BC Cancer foundation

Original Canadian Gift Planning Courses 2010:

- 1. March 23 – 28, 2010**
Banff, Alberta
Faculty: Helen DeBoer-Daggett and Brad Offman
- 2. October 19 – 24, 2010**
Banff, Alberta
Faculty: tba



If you would like to be on the "Interested Participants" list for any of these sessions, please contact Sharyon Smith at education@cagp-acpdp.org for your chance to receive updates on the sessions and the opportunity to register early!

2010 Annual Conference of CAGP-ACPDPTM May 12 – 14

Mark your calendars now to join your friends and colleagues at the Festival of Dreams Conference in Edmonton, Alberta.

CAGP-CGA Series of Webinars

Please visit this site for the complete listing of webinars including the topics and dates. Please be advised this is a member benefit and CAGP-ACPDPTM members receive a registration discount by clicking "other".

For more information on all CAGP-ACPDPTM Educational offerings, visit:
<http://www.cagp-acpdp.org/en/education.aspx>

Gift Planning – All in a Day

This is the newest addition to our complement of continuing education in gift planning. After making its debut at the annual conference in 2009 in Niagara Falls, it is being held at certain venues across Canada. Watch for this event coming to your area!

CAGP-ACPDPTM Conference 2010- Save the Date!



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

Conference Preliminary Program is now available!



Registration opening soon!



LEAVE A LEGACY™

Do you work for a charity or not-for-profit organization and are looking for information on charitable giving to give to donors?

Did you know that as part of your CAGP-ACPDPTM membership, you are able to order LEAVE A LEGACY™ brochures targeted specifically towards the general Canadian public? In partnership with our National Development Sponsor, Great West Life, London Life and Canada Life, we created this brochure to provide Canadians with general, unbiased, information about charitable planned giving and its importance.

This brochure outlines the following information:

- Who we are, what we do;
- Top 10 Things You Can Do to LEAVE A LEGACY™;
- How to get started;
- Common Questions;
- Importance of leaving a gift;
- Who to go to for more information.



Your CAGP-ACPDPTM member rate is \$0.20 per brochure (minimum order of 75). This brochure is available in both French and English. There is a blank space at the back of each brochure that allows for personalization.

If you would like to place an order, please download an Order Form [here](#).

Please contact Jennifer Paradis, National LEAVE A LEGACY™ Coordinator at leavealegacy@cagp-acpdp.org with any questions.






A NOTE FROM ONE OF OUR PARTNERS

* Please click on the image for more details



CAREER CORNER

<p>Director, Transformational Gifts</p>  <p>For more information, click here</p>	<p>Posted: 10/29/2009 End: 11/05/2009 Location: Ottawa, ON</p>
<p>Estate and Gift Planning Officer</p>  <p>For more information, click here</p>	<p>Posted: 11/04/2009 End: 12/04/2009 Location: Hamilton, ON</p>
<p>Executive Director</p>  <p>For more information, click here</p>	<p>Posted: 11/04/2009 End: 12/04/2009 Location: Winnipeg, MB</p>

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-ACPDTM OR HAVE RETURNED FROM A BRIEF PERIOD AWAY

Last Name	First Name	Business Organization	RoundTable
Bell	David	York University, Schulich School of Business	Greater Toronto
Bellisario	Sandra	Easter Seals Ontario	Greater Toronto
Blanchard	Daniel	TD Waterhouse -The Canada Trust Company	Vancouver Island
Bowes	Brian	Raymond James Ltd.	Greater Toronto
Brophy	Charles	Brophy Financial Planning	Ottawa
Busse	Susan	University of Saskatchewan	Saskatchewan North
Chapman	Helen	Queen Elizabeth Hospital Foundation	PEI
Cooper	Beverley	University of Saskatchewan	Saskatchewan North
Cusson	Suzanne		Quebec City (l'est du Quebec)
Cymet	Anita	Crossroads Hospice Society	Greater Vancouver
De Hart	Mark	Investors Group Financial Services	Greater Toronto
Draper	Noel		Greater Toronto
Fequet	Roderick	Heart and Stroke Foundation of Nova Scotia	Nova Scotia
Foster	Brian	Operation Eyesight Universal	Southern Alberta
Hillier	Lynette	Dr. H. Bliss Murphy Cancer Care Foundation	Newfoundland
Johnstone	Jennifer	Central City Foundation	Greater Vancouver
Joudrey	Tracy	Manitoba Theatre Centre	Manitoba
Langford	Brad	Langford Law Offices	London
Le Blanc	Guy	Fondation Franco Albertaine	Southern Alberta
Lynch-Black	Trista	Carleton University	Ottawa
McLean	Leanne	St. Mary's University College	Southern Alberta
Occhiuzzi	Lilien	CF	Greater Toronto
Parent	Claude	La Fondation de l'Université Laval	Quebec City (l'est du Quebec)
Parkin	Sandra	Foundation of Chatham-Kent Health Alliance	London
Peters	Wendy	Saskatoon Community Foundation	Saskatchewan North
Reid	Diane	Boys and Girls Clubs of Calgary	Southern Alberta
Reitberger	Diana	The National Ballet of Canada	Greater Toronto



Stenning Switlo	Annitta Umeeda	Cancercare Manitoba Foundation Inc. CUSO-VSO	Manitoba Greater Vancouver
Trask	Mark Douglas	National Gallery of Canada Foundation	Ottawa
Vincenti	Michele	Quantum Global Financial Corp	Vancouver Island
Westheuser	Jane	University of British Columbia	Greater Vancouver
Wilkinson	Lorelei	Parkinson Society Canada	Greater Toronto

CAGP-ACPDTM UPCOMING EVENTS

<p>On: 11/10/2009</p> <p>View more information</p>	<p>Alberta North RoundTable Event</p> <p>Marketing a Gift Planning Program</p> <p>November 10, 2009</p> <p>MacEwan University, Alberta College Campus, Edmonton AB</p>
<p>On: 11/13/2009</p> <p>View more information</p>	<p>London RoundTable Event</p> <p>London RoundTable TGIF Lunch and Learn Series</p> <p>Friday November 13, 2009</p> <p>Windermere Manor, London, ON</p>
<p>On: 11/19/2009</p> <p>View more information</p>	<p>Greater Toronto RoundTable Event</p> <p>Successfully Integrating Legacy Giving in a Capital Campaign</p> <p>Thursday November 19th, 2009 12:00pm - 1:30pm</p> <p>Ryerson Building- Ted Rogers School of Management</p>
<p>On: 11/19/2009</p> <p>View more information</p>	<p>Ottawa RoundTable Event</p> <p>Advance Yourself - Half Day Conference</p> <p>Thursday, November 19, 2009</p> <p>CHIMO Hotel, 199 Joseph Cyr Street, Ottawa</p>
<p>On: 11/24/2009</p> <p>View more information</p>	<p>Greater Vancouver RoundTable Event</p> <p>Topic and speaker to be announced at a later date</p> <p>Joint meeting with Vancouver Estate Planning Council</p> <p>Tuesday, November 24th, 2009 (5:30pm – 8:00 p.m.)</p>

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