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A NOTE FROM THE EXECUTIVE DIRECTOR October 2009

The month of October is often considered a time of thanks and giving. While Canadians are contemplating what they are thankful for – I think that many might also take this time to consider how they are giving back. To me, this is an important month to reach out to donors and I'm not sure how many charities and advisors use this month to have a "thanks and giving" conversation.

Some ideas surrounding a thanksgiving outreach could be:

- a) Invite donors to write in about what they are thankful for and share their thoughts in next month's newsletter or on-line or even in your community paper.
 - b) Equally important, ask donors (clients) to write in about why they give- why it is important to them. Again, you can post these in a newsletter, on-line, community paper etc.
 - c) Host a "thanks and giving" event - where community members can make public their thank yous to the persons or organization that they feel grateful too. Your charity can take a moment to talk about the many gifts that you are grateful for – demonstrating briefly the impact those gifts have made.
 - d) Hand-write thank-you notes to all your donors (clients) this month - "a thank you for giving" during the month of thanksgiving. Many CAGP-ACPD™ members tell me that hand-written notes are worth the effort. Many donors appreciate the gesture and keep these notes for many years.
 - e) Phone your donors (clients) to thank them during this special month. Ask them what is important to them when they give a gift. Wish them a happy thanksgiving.
 - f) Host a thanksgiving dinner for donors (clients) who find themselves alone on that day.
- You will note that all these suggestions do not have an "ask" attached to it. Sometimes it's just good to stay in touch, to learn more about your donors and to let them know you care about what it important to them.



What is CAGP-ACDPD™ thankful for?

- a) We are thankful for those who continue to speak to Canadians about leaving a gift in their will or a gift today with potential for tomorrow.
- b) We are thankful for our members who see value in their membership and renew each year – especially this year. Without membership revenue, we would not be able to provide the resources that enable members to be better gift planners.
- c) And last but not least, we are thankful for our volunteers across the country – who provide countless hours ensuring that our programs and educational offerings are the best that we can share.

Happy Thanksgiving to all!

Diane MacDonald
Executive Director, CAGP-ACDPD™

QUOTE OF THE MONTH

Evangeline Booth has been quoted as saying, "It is not how many years we live, but what we do with them. It is not what we receive, but what we give to others." Thank you for what you give to our community through your charitable endeavors.

CRA NEWS

October 2009

- [Additional resources added to the Web page for other sources of assistance and support.](#)
- [New Policy Commentary CPC-030, How to be considered for inclusion in the attachment to IC84-3R5, Gifts to Certain Charitable Organizations Outside Canada](#)

REPORT FROM THE BOARD OF DIRECTORS

FRIEND OF CAGP / AMI(E) DE L'ACDPD AWARD

The presentation of the Friends Award, which recognizes service to CAGP-ACDPD™ at the national level, is always a highlight of the Annual Conference. This past spring CAGP-ACDPD™ recognized two of its members: Martin Masse and Sarah Neely with its Friends Award for their exemplary service to CAGP-ACDPD™ over the years. They, as have others who have received the award, were thrilled to be honoured by their peers.

There are many members of CAGP-ACDPD™ some well known to the membership, others not so well known, who have served CAGP-ACDPD™ in an exemplary and ethical manner. The individual or organization might have advanced the work of CAGP-ACDPD™ in the national arena, or served on CAGP-ACDPD™'s national committees, or has been influential in the legislative process re: gift planning, or has raised awareness of gift planning among community at large and/or among professional advisors, etc. You, the members, know who they are! So when the call for nominations comes in October, please take the time, individually or collectively, to put forward that special individual or organization for the Friends Award to be presented by the Board in Edmonton this coming May. *Submitted by Rosemarie Sampson, CAGP Director of the Board.*

[Please click here for the nominations form](#)



PAST RECIPIENTS OF THE FRIEND OF CAGP / AMI(E) DE L'ACPD

1997 - Lorna Somers, McMaster University
1997 - Frank Minton, Planned Giving Services
1997 - Donald K. Johnson, Volunteer
1998 - Carl Juneau, Revenue Canada
1998 - Gilbert Lemieux, Fondation Centraide
1999 - Arthur Drache, Drache LLP
1999 - Jim Hilborn, The Hilborn Group Ltd
2000 - Paul Martin M.P., Minister of Finance
2001 - Charlotte Sutherland, Dalhousie University
2002 - Jo-Anne Ryan, Royal Trust Investments
2003 - Danielle Dagenais-Perusse*; Malcolm Burrows and Ralph Smith
2004 - Trish Mongeon and Judy Davis
2005 - Dr. Edward H. Pearce* and Kayla D. Stevenson
2006 - Ken Ramsay and G. Roger Schoenhals
2007 - Beryl Publicover
2008 - Robert Bédard and Christopher JK Richardson
2009 - Sara Neely and Martin Massé

CAGP-ACPDTM NATIONAL EDUCATION UPDATE

The following is a full complement of gift planning educational sessions being offered by CAGP-ACPDTM over the next 12 months. Mark your calendars and plan on being part of some of these outstanding events. Additionally, as a member of CAGP-ACPDTM you are offered a discounted member rate.

We are also pleased to announce the CAGP-ACPDTM Courses have received pre-approval for [Continuing Education](#) units from both CFRE and Advocis.

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!

Original Canadian Gift Planning Courses

October 20 – 25, 2009 –

Banff, Alberta

Faculty: Brian Shea and Joshua Thorne

Registration is now full- Please contact Sharyon Smith to be placed on a cancellation list.

March 23 – 28, 2010

Banff, Alberta

Faculty: Helen DeBoer-Daggett and Brad Offman

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-ACPDP™ 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-ACPDP™ members receive a registration discount by clicking “other”.

For more information on all CAGP-ACPDP™ Educational offerings, visit:

<http://www.cagp-acpdp.org/en/education.aspx>

INTRODUCING – Gift Planning - All in a Day!

What is “Gift Planning - All in a Day”?

Do you want to be better able to talk to your donors and prospects about gift planning concepts and tools of the gift planning profession? Do you have Board members, Gift Planning/Planned Giving Committee Volunteers, or Senior Development staff with a responsibility for gift planning/planned giving programs? We invite you to join CAGP-ACPDP™ faculty members for a full day of learning and networking. You will begin the day by reviewing Canadian trends and tax issues, move right into a review of the most common gifts in Canada and conclude with marketing, stewardship and how to talk to donors about planned gifts. You will walk away with renewed confidence in discussing gift planning concepts with your donors. All in a day!

This course is being taught primarily by one of our faculty members - Joshua Thorne. In some locations, he will partner with a local seasoned CAGP-ACPDP™ member to assist him with some of the teachings. CFRE credits will be available.

This will be a full one day session, commencing at 8:30a.m. concluding at 4:30p.m. It will include morning coffee break, lunch, and an afternoon coffee break. The cost will be \$199 for members, \$250 for non-members.

Will this course be coming to my city?

This is a National offering that CAGP-ACPDP™ can bring to your RoundTable. Many RoundTables are already in discussion about hosting a session this winter. We can also bring this offering to cities without a RoundTable. If you are located in a geographical location that does not have a RoundTable and would like to host this session, please contact Diane MacDonald, Executive Director at diane@cagp-acpdp.org



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](#).

"Save the Date" bookmarks for the 2010 CAGP-ACPD Conference have been printed and are available from the CAGP-ACPD national office. They can be ordered free of charge by sending an email to rtsupport@cagp-acpd.org.

We encourage you to make them available to your RoundTable members as well as at any event pertaining to Gift Planning. We appreciate your help with our marketing efforts for this year's CAGP-ACPD Annual National Conference in Edmonton, May 12th-14th 2009.

Budgeting for the Conference 2010? Here is some information regarding conference registration and accommodations:

Conference Registration: Early Bird Member registration is \$650

Early Bird Non-member registration is \$755

Payable by **March 26, 2010**.

After that date: Member registration is \$925.00 and non-member registration is \$1030.

Guestrooms at the Edmonton Westin:

Traditional room: \$163.00 (plus applicable taxes) per night single or double occupancy.

Deluxe room: \$198 (plus applicable taxes) per night single or double occupancy.

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

LEAVE A LEGACYTM

What can leavealegacy.ca do for you?

With Thanksgiving around the corner, what better time to talk to your clients and donors about 'Thanks' and 'Giving' to their local charity or favorite not-for-profit group?

The website is a great resource

Time after time, we are told that leavealegacy.ca, is a great resource to direct clients and donors to for all the necessary information when thinking of leaving a gift in their will. Not only does leavealegacy.ca provide information on WHY your donor or client should give, but also includes resources on WHO gives, HOW TO give and WHO can help. We encourage members to borrow, or better yet – steal – our content to incorporate into your own material.

As well, as a CAGP-ACPDTM member you have the opportunity to purchase LEAVE A LEGACYTM marketing materials at special pricing (brochures, pens, notepads, magnets, etc.) to compliment your own planned giving programs.



Canadians ARE visiting!

According to recent website statistics, leavealegacy.ca received 1280 visits with 78.75% being from New Users. Traffic to the site was mostly generated by search engines (66.09%) followed by referring sites (23.44%), and direct traffic (10.47%).



The majority of users visited the Glossary of Terms (ENG) page, with the *Who Can Help* and *Glossary of Terms (FR)* pages following.

For more information about leavealegacy.ca or the LEAVE A LEGACY™ Program, please contact:

Jennifer Paradis, National LEAVE A LEGACY™ Coordinator
 Email: leavealegacy@cagp-acpdp.org
 Tel: 1-888-430-9494 x 3.



CAREER CORNER

<p>Regional Major Gifts Officer</p>  <p>For more information, click here</p>	<p>Posted: 09/11/2009 End: 10/11/2009 Location: Toronto, ON</p>
<p>Associate Executive Director - Fund Development Strategy</p>  <p><i>Finding answers. For life. À la conquête de solutions.</i></p> <p>For more information, click here</p>	<p>Posted: 09/11/2009 End: 10/11/2009 Location: Ottawa, ON</p>



<p>Program Funding Advisor – Conseiller</p>  <p>CHANGING THE WORLD, ONE VOLUNTEER AT A TIME • • • • CHANGER LE MONDE, UN VOLONTAIRE À LA FOIS</p> <p>For more information, click here</p>	<p>Posted: 09/21/2009 End: 10/06/2009 Location: Ottawa, ON</p>
<p>Philanthropic Services Coordinator</p>  <p>For more information, click here</p>	<p>Posted: 09/30/2009 End: 10/30/2009 Location: Vancouver, BC</p>
<p>Corporate Development Manager</p>  <p>For more information, click here</p>	<p>Posted: 10/01/2009 End: 10/22/2009 Location: Ottawa, ON</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-ACPDPTM OR HAVE RETURNED FROM A BRIEF PERIOD AWAY

Last Name	First Name	Business Organization	RoundTable
Boyd	Ann	Ontario Arts Foundation	Greater Toronto
Crowley	Sarah	Canadian Red Cross Society	Manitoba
Fraser	Ryan	Freedom 55 Financial	London
Joyner	Mridula	YMCA of Greater Toronto	Greater Toronto
Kilbride	Joan	Canadian Mental Health Association	Saskatchewan South
MacDougald	Jane	Heart & Stroke Foundation of NS	Nova Scotia



Olafsen	Doris	Opportunity International	Greater Toronto
Peck	Darryl	The National Aboriginal Achievement Foundation	Greater Toronto
Ribeiro	Pedro	Keybase Financial Group Inc.	Waterloo-Wellington
Tchitacov	Aki	Bon Dieu dans la rue	Greater Montreal
Tehranian	Tina	Assante Capital Management Ltd.	Greater Toronto
Walker	Alan		Greater Toronto
Wilde	Manda	Government of Alberta - c/o ASRPWF	Alberta North

CAGP-ACPDPTM 2009 Members' Survey

Welcome to a new 2009 CAGP-ACPDPTM members' survey.

Your contribution to this information gathering process is important not only to CAGP-ACPDPTM but to the ongoing development of our profession.



To encourage participation, there is a **draw for a digital camera!!**
(The winner will be notified by e-mail during the week of November 9, 2009)

[Click here to take survey](#)

The deadline for completing this questionnaire is Friday, **October 30th, 2009**. All responses will be kept completely **CONFIDENTIAL**. The CAGP-ACPDPTM will share the outcomes of this survey with our members in early 2010.

Thank you in advance for your participation.

If you have problems accessing the survey, please contact CAGP-ACPDPTM National Membership Coordinator, Anne Williams at membership@cagp-acpdp.org.



CAGP-ACDP™ UPCOMING EVENTS

<p>On: 10/15/2009</p> <p>View more information</p>	<p>Toronto RoundTable Event</p> <p>BREAKFAST EDUCATION SESSION</p> <p>Endowments- A Bird in the Hand or Two in the Bush</p> <p>Thursday October 15, 2009</p> <p>8:00 to 8:30 a.m. Registration & Breakfast</p> <p>8:30 to 9:30 a.m. Education Session</p>
<p>On: 10/20/2009 Duration: Until 10/25/2009</p> <p>View more information</p>	<p>CAGP-ACDP ORIGINAL Gift Planning Course</p> <p>The Canadian Gift Planning course, CAGP-ACDP™'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>
<p>On: 10/23/2009</p> <p>View more information</p>	<p>Niagara/Golden Horseshoe RoundTable Fall Conference</p> <p>"Fundraising in Extraordinary Times"</p> <p>Casablanca Winery, Grimsby ON</p> <p>Friday October 23, 2009 8:00am- 4:00pm</p>
<p>On: 10/28/2009</p> <p>View more information</p>	<p>Ottawa RoundTable Event</p> <p>Legacy Giving for the Small Shop Fundraiser and Everyone Else</p> <p>Wednesday October 28th, 2009 7:00am</p> <p>Hampton Inn (room 212) Ottawa, ON</p> <p>Speaker: Helen Deboer-Daggett</p>
<p>On: 10/29/2009</p> <p>View more information</p>	<p>TableRonde de l'est de Québec</p> <p>Les fond de donation personnalisés: comment ça fonctionne pour les organismes et les donateurs (only offered in French)</p> <p>Thursday October 29, 2009 9am-11:30am</p>



On: 11/13/2009 View more information	London RoundTable Event London RoundTable TGIF Lunch and Learn Series Friday November 13, 2009 Windermere Manor, London, ON
On: 11/19/2009 View more information	Greater Toronto RoundTable Event Successfully Integrating Legacy Giving in a Capital Campaign Thursday November 19th, 2009 12:00pm - 1:30pm Ryerson Building- Ted Rogers School of Management

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