

CAGP PLANNER ACPDP

September 2009 VOL 24 Number 7

A NOTE FROM THE EXECUTIVE DIRECTOR September 2009

Most of you will have received the notification sent out a few weeks ago – regarding the revised version of the “Planned Giving for Canadians e-book”. This book is described as the “bible of Gift Planning” – written and developed by Frank Minton and Lorna Somers. Frank continues to update this book each summer. As a member of CAGP-ACPDPTM, not only did you receive the first e-version in 2007 on a CD, but you will continue to receive the annual updated version.

Often I receive compliments regarding the value of membership with CAGP-ACPDPTM and Frank’s book comes into the conversation. For a membership of \$299, you receive more than that in benefits. For fun, let’s do the math:

Value of CAGP-ACPDPTM Benefits

<i>Planned Giving for Canadians</i>	\$100 per e-book per year
<i>A Charitable Guide to Planned Giving</i>	\$150 per year
<i>Planforgifts.com</i>	\$120 the first year
	\$370 – savings of \$70 per year.

In addition you receive:

You save:

Discounts off of RoundTable events	\$5-\$20 per event
Discount off the National Educational Course	\$350
Discount off the National Conference	\$300
Discount off of many partner offerings:	
George’s Tree – The Story of a Well-Planned Gift	15% off

CGA – Webinars

CSA courses (Canadian Senior Advisor)

Ads in Charity Times Magazine

Let’s not forget:

Use of the “Ask an Advisor” button, Timely news, stories, stats, the Planner; A voice with the government to better enable giving in Canada; CE credits – including CFRE and Advocis; Belonging to a national public awareness program; Sharing best practices AND Making life-long friendships....

PRICELESS!

CAGP-ACPDPTM
Diane MacDonald
Executive Director, CAGP-ACPDPTM

A special thank you to Debra Klippenstein for her contributions to this article.

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DISCLAIMER

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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.

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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

September 2009

- [The 2009 fall registrations for the Charities Information Sessions are now available on our Web site.](#)
- [Revised Web page for Registered charity vs. non-profit organization](#)
- [New fill able Form T2050, Application to Register a Charity Under the Income Tax Act](#)

REPORT FROM THE BOARD OF DIRECTORS

The Forethought in our Name

I was reminded recently, at the national conference of the Canadian Association of Gift Planners, how important the name of our association has been, is and will be in the evolution of our field.

The founding group had the forethought to start and develop the Canadian Association as "Gift Planners". From the beginning, CAGP-ACPD[™] has focused on a holistic approach - the entire continuum of giving. This is reflected in our 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.*"

To refer to our field as *gift planning* evokes a picture of an active process working with the whole continuum of giving (current and future gifts) utilizing our tool box within a collaborative approach.

The picture that *planned giving* evokes is usually only of the technical vehicles that make up our tool box and is to me a limited approach for what we do and the vision of what is to come.

The importance of CAGP-ACPD[™] forethought was clearly evident in the CAGP-ACPD[™] Board's recent extensive conference call with the National Committee on Planned Giving (our counterpart in the USA). Our goal was to learn what led to their decision to change to the newly named Partnership of Philanthropic Planning. There are a number of factors that contributed to this decision. One of the most striking factors was that the original name National Committee on *Planned Giving* generally only evoked the awareness of expertise in the technical tool box and had created a limited perception of the field - *Gift Planning*.



As was evidenced at our last national conference, there are a growing number of Canadian charities that are integrating major gift and planned giving work – this results in models that more closely reflect our definition of gift planning. This is also an increasing emphasis on the inclusion of annual giving work. The purpose of the Canadian Association of Gift Planners is to support philanthropy by fostering the development and growth of *gift planning*. The Association creates awareness, provides education and is an advocate of charitable giving.

Our Vision: Inspired giving through enlightened planning and **our Mission: Advancing the work of professionals in gift planning** guide the Board in the strategic development of CAGP-ACPDTM, building on the strong foundation and forethought established in our name: Canadian Association of *Gift Planners*.

Comments and suggestions are welcome, please send to marilyn.monson@ualberta.ca

Marilyn Monson
Director, CAGP-ACPDTM Board Member

CAGP-ACPDTM NATIONAL EDUCATION UPDATE

ADVANCED Canadian Gift Planning Course

Space is very limited! Register today for the [Advanced Course!](#)

Plan on being at the Whistler Village Delta Suites Hotel, BC, September 22 – 27, 2009 for this amazing 'one of a kind' educational opportunity.

Join CAGP-ACPDTM faculty Malcolm Burrows and Susan Manwaring as they share their wealth of knowledge; and earn both ADVOCIS and CFRE continuing education credits while upgrading your skills.

This course will not be offered for another two (2) years – don't miss out on this unique offering!

Original Canadian Gift Planning Course, October 20-25, 2009, Banff AB

Faculty: Brian Shea and Joshua Thorne.

[Registration](#) is now open! This is the last opportunity to attend this course until March 2010.

This is what previous attendees had to say about this CAGP-ACPDTM signature course:

---This is the only place you are going to get an overall and comprehensive review of planned giving specifically for Canada;

--- It's nice to know that there is a way that a fundraiser can break into this ever growing profession;

--- Truly the gift planning "boot-camp" - come prepared to learn, and to meet your wonderful current and future peers;

--- This workshop is easily one of the most informative and well organized work shops I have attended. Dynamic teachers, diverse and engaged participants - a must for professionals in this field.



Original Canadian Gift Planning Course, March 23–28, 2010, Banff AB

Faculty: Brad Offman and Helen DeBoer-Daggett

Still haven't attended an Original Course? Mark this date in your calendar and contact Sharyon Smith at education@cagp-acpdp.org to be placed on the Interested Participants List. Being placed on this list gives you the opportunity to register for this course in advance of the full membership.

For full and further details please click [here](#).

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-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](#).

"Save the Date" bookmarks for the 2010 CAGP-ACPDPTM Conference have been printed and are available from the CAGP-ACPDPTM national office. They can be ordered free of charge by sending an email to rtsupport@cagp-acpdp.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-ACPDPTM 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-ACPDPTM.org for more information about registration, accommodations and conference sessions.

LEAVE A LEGACYTM

Did you know that your LEAVE A LEGACYTM program is supported by a committed group of volunteer CAGP-ACPDPTM members who serve on a LEAVE A LEGACYTM National Advisory Committee?

Much like other operational committees of the CAGP-ACPDPTM, the LEAVE A LEGACYTM National Advisory Committees meets regularly by conference call to discuss, develop and recommend LEAVE A LEGACYTM strategies, guidelines and resources.

Main Objectives

- To improve communication between the National Office and local LEAVE A LEGACYTM Chairs;
- To develop better structures of governing policies, procedures, compliance, and strategies and implementation plans;



- Improved communication and dialogue amongst local Committees
- To support local volunteer efforts.

So, who is your LEAVE A LEGACY™ National Advisory Committee? Here is the list of current Committee members for 2009-2010:

Catherine M. Hurley, (Chair)
Greater Toronto Area RoundTable

Manitoba RoundTable
Rob Pepper
Windsor RoundTable

Sue Hardy
London RoundTable

Tamara Coleman-Lawrie
Niagara-Golden Horseshoe RoundTable

Ross Young
Southern Alberta RoundTable

Joan Weld
Southern Alberta RoundTable

Lucille Grimard
Montreal RoundTable

Suzanne Dubé
Greater Vancouver Island RoundTable

Kristine Betker

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 x 3.



STRONGER COMMUNITIES TOGETHER™



CAREER CORNER

Executive Director

David Thompson

HEALTHTRUST

For more information, [click here](#)

Posted: 08/17/2009

End: 09/18/2009

Location: Red Deer, Alberta

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

First Name	Last Name	Business Organization	RoundTable
Tracy	Boyle	Saskatoon Health Region	Saskatchewan North
Mark	Eaton		Manitoba
Jennifer	Hamilton	MD Insurance Agency Limited	Greater Toronto
Lorie	Langenfurth		Saskatchewan North
Angelica	McKay	Christian Horizons	Waterloo-Wellington
Alen	Okanovic	Canadian Red Cross Society	Southern Alberta
Laura	Rumble	BC Children's Hospital Foundation	Greater Vancouver
Tina	Tehranchian	Assante Capital Management Ltd.	Greater Toronto
Jakee	Werbuk	United Way of Winnipeg	Manitoba

CAGP-ACPDTM UPCOMING EVENTS

<p>On: 9/9/2009</p> <p>View more information</p>	<p>Alberta North RoundTable Event</p> <p>Wednesday September 9th, 2009. 3pm</p> <p>Winspear Centre, Upper Lobby Circle</p>
<p>On: 9/9/2009</p> <p>View more information</p>	<p>Ottawa RoundTable's September Social!</p> <p>Wednesday September 9th, 2009 4:30-6:00pm</p> <p>Ashbury College, Rockcliffe Park Ottawa</p>
<p>On: 9/10/2009</p> <p>View more information</p>	<p>Southern Alberta RoundTable Event</p> <p>Harnessing the Power of Humour in Donor and Client Relations</p> <p>Thursday September 10th, 2009</p> <p>11:30am (lunch and presentation)</p>
<p>On: 9/11/2009</p> <p>View more information</p>	<p>London RoundTable Presents: Now more than Ever: Legacy Giving in Extraordinary Times</p> <p>September 11th, 2009</p>



	<p>Windermere Manor, London ON 11:45pm-1:30pm</p>
<p>On: 9/16/2009 View more information</p>	<p>Winnipeg RoundTable Event Symposium- Law, Philanthropy and New Economic Challenges: Changing the Rules of Engagement.</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 Law, Philanthropy and New Economic Challenges: Changing the Rules of Engagement.</p> <p>September 16th, 2009</p>
<p>On: 9/17/2009 View more information</p>	<p>Greater Toronto RoundTable Event</p> <p>Reflections on the Global Economic Storm-- What Might the Way Ahead Hold For Us?</p> <p>September 17, 2009 12:00pm-1:30pm</p> <p>Ryerson Business Building Ted Rogers School of Management</p> <p>Toronto ON</p>
<p>On: 9/22/2009 Duration: Until 09/25/2009 View more information</p>	<p>CAGP-ACPD ADVANCED Gift Planning Course Description</p> <p>CAGP-ACPD™ is pleased to repeat 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>On: 9/22/2009 View more information</p>	<p>Niagara/Golden Horseshoe RoundTable Event</p> <p>Professional Development Breakfast- An Advisor's Toolkit for Philanthropy</p> <p>Tuesday September 22, 2009 7:30am- 8:45am</p> <p>Speaker: Karen Bjerland</p> <p>Burlington Golf and Country Club</p>
<p>On: 9/29/2009 View more information</p>	<p>Vancouver Island RoundTable Event</p> <p>Building Your Legacy With a Charitable Giving Fund Tuesday September 29, 2009: 1:30pm to 3pm</p> <p>presented by Fran Davis and Angela Wright</p>



<p>On: 9/24/2009</p> <p>View more information</p>	<p style="text-align: center;">Greater Vancouver RoundTable Event</p> <p style="text-align: center;">The Ten Best Practices of Passionate Philanthropy - A Joint meeting with the Association of Fundraising Professionals</p> <p style="text-align: center;">Thursday, September 24, 2009</p> <p style="text-align: center;">7:30a.m. - 9:30a.m.</p> <p style="text-align: center;">Arbutus Club - 2001 Nanton Avenue</p> <p style="text-align: center;">Cost: \$25.00 for CAGP-ACPD members (\$35.00 for non-members)</p>
<p>On: 9/30/2009</p> <p>View more information</p>	<p style="text-align: center;">Montreal RoundTable Event</p> <p style="text-align: center;">Les Dons Planifiés: Une Source de Bienfaits Encore peu Exploitée <i>(in French only)</i></p> <p style="text-align: center;">Fondation du Centre hospitalier universitaire de Québec (CHUQ)</p> <p style="text-align: center;">Le 30 Septembre, 2009</p>
<p>On: 9/30/2009</p> <p>View more information</p>	<p style="text-align: center;">Manitoba RoundTable Event</p> <p style="text-align: center;">Reach. Relationships. Results</p> <p style="text-align: center;">Wednesday September 30th, 2009</p> <p style="text-align: center;">Reception: 5:00-7:00pm</p> <p style="text-align: center;">Presentation: 5:30pm</p> <p style="text-align: center;">Norwood Hotel (Ballroom)</p>
<p>On: 10/20/2009</p> <p>Duration: Until 10/25/2009</p> <p>View more information</p>	<p style="text-align: center;">CAGP-ACPD ORIGINAL Gift Planning Course</p> <p>The Canadian Gift Planning course, CAGP-ACPD™'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. 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 style="text-align: center;">Niagara/Golden Horseshoe RoundTable Fall Conference- "Fundraising in Extraordinary Times"</p> <p style="text-align: center;">Casablanca Winery, Grimsby ON</p> <p style="text-align: center;">Friday October 23, 2009 8:00am- 4:00pm</p>

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