



CAGP - Taking Leadership on Canada's New Rules in Estate Administration

In the 2014 Federal Budget, the Government of Canada tabled new rules on estate administration. Poised to come into effect in 2016, experts are expressing grave concerns about the impact of this legislation on Canada's charities and donors.

CAGP is in full strategizing mode in order to ensure our members understand the new rules and their implications, as well as what actions they might take to ensure organizational readiness, support their donors or mitigate anticipated challenges. In tandem, we want to ensure that CAGP's perspective as the subject matter expert is voiced to government, to assist them in better understanding the implications of these changes on the sector, and that recommendations for amendments are brought forward.

Recently the CAGP Government Relations and Education Committees – a truly impressive group of established professionals and recognized authorities, and one of CAGP's key assets – held a joint meeting to discuss the matter. A number of actions and next steps were identified and, while they continue to be fleshed out, we wanted to ensure our members are aware of CAGP's leadership on the issue and know they can rely on us for relevant information over the coming months.

As the Government Relations Committee continues to determine strategy, preparation is underway for a submission to government with key recommendations that would help ensure the new rules do not adversely affect charitable giving in Canada. CAGP will explore potential partnerships or collaborations with national voluntary sector organizations as well as other professional associations with an interest in these legislative changes, and will also be considering whether the engagement of CAGP RoundTable members in augmenting the message at the local level would be an effective tactic. We look forward to sharing details of this submission and keeping members apprised of next steps.

CAGP members look to *Gift Planning in Canada* for information on the latest issues and trends in strategic charitable giving. In February, Hilborn and CAGP will be partnering on a special issue of *GPIC* focused entirely to the new estate administration rules, with articles from the charitable, estate, legal and policy perspectives.

The Education Committee will be meeting in late January to strategize on how to best further inform, educate and facilitate dialogue on the topic, with members and beyond. Information and discussion on the new rules will be integrated into the next *Original Canadian Gift Planning* course, to be held in Banff, AB in March – registration is still open and information can be found on www.cagp-acpdp.org. A webinar on the topic is being considered for March and we are exploring the feasibility of making this available at no cost given the enormity of this issue for members and the sector. The Committee will consider the possibility of an *Advanced Gift Planning* course later in 2015 or early 2016.



The April CAGP Annual National Conference in Halifax, NS will be a premier venue for learning more about this important issue, the potential impact and how to be ready for these changes. In addition to informal access to experts and conversations with colleagues during the many networking opportunities, look for Malcolm Burrows’ session specifically focused on the new rules, and Calvin Fong will deliver a workshop on estate administration for charities. Given the significance of this issue, anticipate it being informally woven into discussions at other sessions throughout the conference as well. The annual Government Relations session will also be an opportunity to hear more about the work of the GR Committee on this issue as well as other areas of focus over the last year. This year, the GR session will also include some tips on how to engage in government relations work and make your organization “GR ready”, integrating the new estate administration rules as an example. For more information on the 22nd Annual CAGP National Conference visit www.cagpconference.org.

Members are invited to stay tuned for more on this important issue as new information unfolds and becomes available. As Canada’s leading authority on strategic charitable gift planning, members can count on CAGP for timely and comprehensive information on relevant and topical issues, to be an active advocate for a beneficial tax and legislative environment, and to champion the growth and development of strategic charitable gift planning in Canada.

Malcolm Berry
Chair, Board of Directors

Ruth MacKenzie
Executive Director