

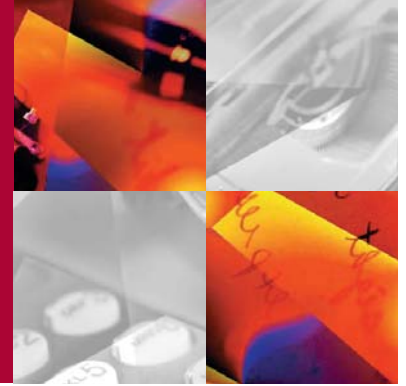


THE CANADIAN BAR ASSOCIATION
L'ASSOCIATION DU BARREAU CANADIEN



ONTARIO
BAR ASSOCIATION
A Branch of the CANADIAN BAR ASSOCIATION

2009 National Charity Law Symposium



Presented by the CBA and OBA Charity and Not-for-Profit Law Sections and the Continuing Legal Education Committee

2009 National Charity Law Symposium
Thursday, May 7, 2009
InterContinental Toronto Centre Hotel
225 Front Street West
Toronto, Ontario

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Co-Chairs:

Terrance S. Carter, *Carters Professional Corporation, Orangeville*
Linda J. Godel, *Torkin Manes Cohen Arbus LLP, Toronto*

This joint program of the Canadian Bar Association's and the Ontario Bar Association's Charity and Not-For-Profit Law Sections will bring together leading experts from across Canada to speak about the latest developments in this rapidly changing area. Refreshers on key issues affecting charities in Canada will also be addressed.

Get the lowdown on Canada Revenue Agency's new fundraising policy and the forthcoming policies on Foreign Activities. Delve into the meaning of a gift from a tax perspective. Explore strategies for dealing with contentious board and membership meetings. Learn the basics of obtaining charitable status in Canada. Explore considerations in developing gift acceptance policies. Listen to new thoughts on the advancement of religion in a pluralistic society. Discuss due diligence and best practices when serving vulnerable persons. Find out about developing trends in business activities and social enterprise and what the future holds for Canada.

Plus, get an exclusive update direct from the Canada Revenue Agency on current issues impacting your clients!

Présenté par les sections du droit des organismes de bienfaisance et à but non lucratif de l'ABC et de l'ABO, le symposium réunira des experts de renommée nationale qui discuteront des nouveautés dans ce domaine en constante évolution. Ils aborderont aussi les enjeux principaux touchant les organismes de bienfaisance canadiens.

Renseignez-vous sur la nouvelle politique de l'Agence du revenu du Canada concernant les campagnes de financement et les prochaines politiques sur les activités à l'étranger. Examinez la notion de "don" d'un point de vue fiscal. Faites le tour des stratégies visant le règlement de questions litigieuses lors de réunions du conseil et des membres. Apprenez les principes de base relatifs à l'obtention du statut d'organisme de bienfaisance au Canada. Analysez certains facteurs relatifs à l'élaboration de politiques sur l'acceptation de dons. Entendez de nouvelles idées sur le développement de la religion dans une société multiculturelle. Discutez de la diligence raisonnable et des pratiques exemplaires relativement à la prestation de services aux personnes vulnérables. Découvrez des façons de créer des tendances en entreprise d'économie sociale et ce qui attend le Canada à l'avenir.

De plus, obtenez une mise à jour exclusive directement de l'Agence du revenu du Canada sur des questions d'actualité qui ont une incidence sur vos clients!

Ce programme est offert uniquement en anglais.



Program

THURSDAY, MAY 7, 2009

8:00 – 8:30 REGISTRATION

8:30 – 8:35 OPENING COMMENTS

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Linda J. Godel, *Torkin Manes Cohen Arbus LLP*, Toronto

TIMELY NEW TAX TOPICS TO CONSIDER

8:35 – 9:05 New CRA Fundraising Policy and Its Practical Implications

Susan Manwaring, *Miller Thompson LLP*, Toronto

9:05 – 9:35 New CRA Foreign Activities: Charities Circumnavigating the World Without Falling Off the Edge

Mark Blumberg, *Blumberg Segal LLP*, Toronto

9:35 – 10:05 Business Activities and Social Enterprise: Towards a New Paradigm

Terrance S. Carter, *Carters Professional Corporation*, Orangeville

Theresa Man, *Carters Professional Corporation*, Orangeville

10:05 – 10:35 The Advancement of Religion in a Pluralistic Society

Dr. Donovan Waters, Q.C., F.R.S.C., *Horne Coupar*, Victoria

10:35 – 10:55 REFRESHMENT BREAK

NEW THOUGHTS ON GIFTING

10:55 – 11:25 Strategies in Gift Planning for High Net Worth Individuals

Malcolm Burrows, *Scotia Private Client Group*, Toronto

11:25 – 11:55 Considerations in Developing Gift Acceptance Policies

Laura West, *Fasken Martineau*, Toronto

11:55 – 12:25 What is the Meaning of a Gift from a Tax Perspective?

Professor Adam Parachin, *University of Western Ontario*, London

CRA COMES TO LUNCH

12:25 – 1:20 LUNCHEON (included in registration fee)

1:20 – 1:55 CRA Comes to Lunch

Terry de March, *Director General, Charities Directorate, Canada Revenue Agency*, Ottawa

1:55 – 2:00 **Short Break (5 minutes)**

DEALING WITH CANADA REVENUE AGENCY

2:00 – 2:30 **The Basics of Obtaining Charitable Status: A Guide for Practitioners**
Margaret Mason, *Bull, Housser & Tupper LLP*, Vancouver

2:30 – 3:00 **CRA Rulings Regarding Charities: What Practitioners Need to Know**
Carole Chouinard, *Gowling Lafleur Henderson LLP*, Ottawa

3:00 – 3:15 **REFRESHMENT BREAK**

PUSHING THE ENVELOPE: CHALLENGING AREAS OF PRACTICE

3:15 – 3:45 **Strategies for Contentious Board and Membership Meetings**
Hartley Nathan, *Minden Gross LLP*, Toronto

3:45 – 4:15 **Telemarketing Rules: What Charities Need to Know**
Carol Anne O'Brien, *Cassels Brock & Blackwell LLP*, Toronto

4:15 – 4:45 **Vulnerable Persons Due Diligence & Best Practices**
Peter C. Straszynski, *Torkin Manes Cohen Arbus LLP*, Toronto

4:45 – 4:55 **QUESTIONS AND CLOSING REMARKS OF CO-CHAIRS**

4:55 **WINE AND CHEESE RECEPTION**

Compliments of our sponsors

National Charities and Not-for-Profit Law Section Meeting

Members are invited to the National Charities and Not-for-Profit Law Section meeting in Toronto on May 6, the evening prior to the CLE Conference. This is a wonderful opportunity to meet the National Executive and to learn about the activities of the Section. **To RSVP and for more information, please contact Corinna Robitaille at corinnar@cba.org.**



This program has been accredited by the Law Society of Upper Canada towards the professional development requirement for certification.
Civil Litigation: 7 hours



This program has been approved for LawPro CLE Premium Credit. For more information, please consult the following LawPro web page: <http://www.lawpro.ca/CLECredit/default.asp>

This program has been approved for 6.75 hours of Continuing Professional Development (CPD) by the Law Society of British Columbia.

For updates on the program, please visit our web-site at www.cba.org/CBA/CLE

Speakers subject to change

Registration Form

MEETING VENUE

InterContinental Toronto Centre Hotel
225 Front Street West, Toronto, ON
Telephone: 416-597-1400 or 800-422-7969
Website: www.torontocentre.intercontinental.com

HOTEL RESERVATION

Please contact the hotel directly and specify **CBA -2009 National Charity Law Symposium** when reserving to obtain the preferred rate. The preferred room rate is available until **Wednesday, April 8, 2009**.

TRAVEL

Air Canada is the official carrier for all our CBA meetings. In order to receive a 10% discount, you must book your flight on-line at www.aircanada.ca and indicate the **promotion code EUPNE4DI**. **The discount is not available if you call Air Canada directly.**

CAR RENTAL

AVIS, the official rental car supplier of the CBA, offers several special rates. Call 1-800-331-1600 or visit www.avis.com to reserve your car. You must quote discount number **C136498**.

REGISTRATION

Pay by credit card (Visa, MasterCard or AMEX), or send cheque or money order made payable to the Canadian Bar Association together with this registration form to:

Ashley Woodford
CLE Program Coordinator
Canadian Bar Association
865 Carling Ave., Suite 500
Ottawa, ON, K1S 5S8 or

Fax to: 613-237-0185
Email: ashleyw@cba.org

PAYMENT MUST BE RECEIVED PRIOR TO THE ACTUAL CONFERENCE TOGETHER WITH A COMPLETED REGISTRATION FORM

INVOICES WILL NOT BE ISSUED

REFUND POLICY: There will be a 20% administrative charge for any cancellation received in writing prior to **April 7, 2009**. No refund will be given after **April 7, 2009**.

There will be no refunds for "no-show" registrants. The program material will be shipped to registrants unable to attend the program within 15 days of the program.

INFORMATION

For further information about this program, please contact **Ashley Woodford** at the CBA National Office by telephone at **613-237-2925 or 1-800-267-8860 ext. 186**, or by e-mail at ashleyw@cba.org.

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	FEE	GST (5%)	TOTAL
<input type="checkbox"/> CBA Members	\$315.00	\$15.75	\$330.75
<input type="checkbox"/> Students (CBA Members)	\$200.00	\$10.00	\$210.00
<input type="checkbox"/> Non-Members	\$415.00	\$20.75	\$435.75

Payment due with registration application
All receipts are mailed after the conference

- Yes**, I would like to join the CBA now and pay the member fee to attend this program. I understand that a membership representative will be contacting me.
 Yes, I will be attending the closing reception.

Materials will be available for sale online following the conference. Please visit www.cba.org/store for prices and ordering information.

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Please indicate special needs (dietary, wheelchair access, etc.)

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Authorized Signature

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CBA's programs are supported by preferred suppliers, sponsors, and exhibitors. Subject to the following paragraph, I understand that the provision of contact information on this form constitutes my consent to such information being disclosed to the preferred suppliers, sponsors, and exhibitors of this program. For further information about the CBA's treatment of personal information, see members' Privacy Policy at www.cba.org.

By checking this box , I do not wish my contact information disclosed to the preferred suppliers, sponsors, and exhibitors of this program. I understand that my name will not appear on the delegates list.