

PUBLISHER'S NOTE

The nicest people...

Welcome to the 39th edition of the Canadian Donor's Guide – your authoritative annual directory of fundraising organizations in Canada. I am honoured to provide you with this comprehensive reference resource and related editorial content to assist with your respective responsibilities in the planned giving environment.

We continue to deliver more than 17,000 copies of our publication to key decision makers and professional advisors in Canada's donor community. This would not be possible without the relationships the Canadian Donor's Guide shares with the Canadian Association of Gift Planners (CAGP), the Canadian Bar Association, STEP Canada and Imagine Canada. Their support and commitment to our efforts is truly appreciated. In addition, we could not provide this Guide without the many charitable organizations across Canada who put their trust in us to bring their messages to their key audience – those charities who purchase advertising in our pages.

This is the opportunity I take each year to look back over the time since our last edition and to review some of the things happening in the charitable sector in Canada.

When I saw the job posting of the previous publisher, Anderson Charters, I was drawn to the position because Anderson noted that we would be working with the nicest people across Canada. I am very happy I applied for

that role and was hired for the position back in 2007, which started me on the path to becoming the publisher of this valued publication.

Indeed, Anderson was right, I get to work with the nicest people across this country, who are all doing good works. The CAGP conference last Spring brought many of those people together in Ottawa. We got to meet old friends again, meet some of the friends we have previously only known digitally and to meet new friends. It is only a few days but it feels like a lifetime of memories are made at this annual conference. The 2024 theme was Convergence of Generosity. It was a fitting theme. We would like to thank the CAGP, its staff members, board members and all of the volunteers who worked together to host this incredible event.

Within the pages of this edition of the Canadian Donor's Guide we have the words of Malcolm Burrows who shares his thoughts about the Foundation Perpetuity Myth. Malcolm states that foundations are flexible and evolve over time and that emphasis should be on philanthropic responsiveness and finding the right balance between current and future community needs.

Thank you to Adam Aptowitzer, of KPMG Law, for his updated advice about charitable donations from a tax perspective.

This edition contains a plethora of information about wills and estate planning including an article from law clerk,



Alison Stoneman
Publisher, Canadian Donor's Guide

Sandra Arsenault, from Fasken Martineau DuMoulin, LLP, who provides an overview of the role of an executor of a Will and what a job posting for the position might look like if it existed.

Sandra L. Pierce, known as the Bag Lady of Bay Street, brings us advice about how we can ensure our four-legged family members are assured of being properly taken care of when we pass. Sandra urges us to include provisions for our pets in our estate plans. Sandra's advice has me thinking that my husband and I need to do that for our Murphy dog.

Will Power has provided us with information about leaving a donation to charity in our wills and, in fact, there is power in leaving a donation to charity in our Will. Give this article a read for some valuable information.

Ian Hull, co-founder of Hull & Hull, LLP, is back in this edition giving us information and guidance about how secondary or multiple Wills in an estate might be dealt with by the court.

There are two articles about conservation within our editorial section for this edition. From our friends at World Wildlife Fund Canada (WWF-Canada) we learn of the technological tools that are being used to provide the opportunity to track and monitor polar bears. This will help researchers understand how polar bears are faring and assist with learning how to manage and conserve these incredible Arctic animals. The researchers are using some unique ways to learn from these bears without

having much direct contact with them and ways that are less intrusive to these incredible animals.

The second article on conservation is brought to you by Nature Conservancy Canada (NCC). Jeremy Hogan, the director of Prairie Grassland Conservation, who has been in awe of the massive expanse of grasslands in our prairie region since he was a child, educates us about the grasslands that he describes are workhorses for our land, our people and play an important role in agriculture. These grasslands are among the most endangered ecosystems in the world. Jeremy shares information about the work NCC is doing to care for and conserve these grasslands and states that they need “everyone at the table to help to ensure their future”.

We have included an article written by Duke Chang, President and CEO of CanadaHelps, who brings us information from *The Giving Report* about trends taking place in Canada. One of these trends is that our connections and social bonds with each other are contracting, which, in turn, is changing how we engage with the world around us. Comparisons are given between charitable giving and how many friends a per-

son has is quite enlightening. Advice for charities to fight these trends is explored.

Reprinted from the Canadian Bar Association’s *National Magazine* is an article about steps to reconciliation beyond land acknowledgements. Information from the firm McCarthy Tétrault in Toronto and MLT Aikins LLP from Western Canada on how they are making steps to prioritize education and work with Indigenous communities to develop relationships in a meaningful way.

There are 3 inspiring profiles included from the Salvation Army, the War Amps and the Terry Fox Foundation.

From the Salvation Army we learn about Nicole, who went from living in her car, needing assistance, to where she is today as the manager for a Salvation Army Thrift Store.

From the Terry Fox Foundation we are inspired by Owen’s story, a young man who is heading off to university at the time of this writing as a cancer survivor, who now tries not to “sweat the small stuff” and practices random acts of kindness.

The War Amps shares the story of Chris Koch, who was born without both arms and legs, but always managed to figure out a way to do the things he wanted to

do with the support of his family and from The War Amps Child Amputee (CHAMP) program. Chris says he is just a “regular dude” but take a good read of this article to find out how inspiring this regular dude really is.

The final inclusion is a postscript from the publisher. It is my tribute to a valued, long-time friend of the Canadian Donor’s Guide, Paul Nazareth, who has started a new path, a desire path.

Thank you again for your dedicated support of the Canadian Donor’s Guide as a valued resource. If you have suggestions, ideas or questions, feel free to contact me directly. May this Guide always be helpful in your endeavours to easily and effectively match donors with charities.

Please know that I am thinking of all of the nicest people across Canada. Those that are working hard on behalf of charities in all communities, from the largest to the smallest. And those people supporting those charities with their time, their money and their planned gifts, leaving a legacy. I am also thinking about the nicest people who are advisors to those doing their financial and estate planning. I thank you all for continuing to do what you do.



Photo credit to Paul Nazareth @generosityguy

Posted by Rachel Pearson - 1B Civil on February 13, 2024 on the website of The Iron Warrior:

“I find joy in the idea that something so simple as a desire path can suggest the freedom we have with our choices, the freedom to ignore the written rule. Humans will always choose to make their environment suit them rather than change themselves, which can be dangerous, but in the case of the desire path is just practical, efficient, and a little bit fun; grounding oneself in the grasses just to the side of a concrete path can feel cathartic... maybe even rebellious.

Maybe I’m dramatizing it, as it is just a beaten down patch of grass. But I feel as though it is representative of so much more. A path highlighting the true nature, the true desire of humans...”

The Iron Warrior is produced by the University of Waterloo’s Engineering Society and can be found at <https://iwarrior.uwaterloo.ca/>

Desire line or desire path : an unplanned route or path (such as one worn into a grassy surface by repeated foot traffic) that is used by pedestrians in preference to or in the absence of a designated alternative (such as a paved pathway) - from <https://www.merriam-webster.com/dictionary/>