



OBA • ABO

Registration

Register me for **Issues in Charity Law: A Pot Pourri**
Tuesday, October 22, 2002 - 9:00 a.m. to 1:00 p.m.

02CHA1022C

Name: _____

Membership #: _____

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Address: _____

City: _____ Postal Code: _____

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Payment (registrations must be prepaid)

Cheque Visa Mastercard

Credit Card Number: _____ Expiry date: _____

Signature: _____

REGISTRATION FEES:

<input type="checkbox"/> OBA Member	\$195 + \$13.65 GST	=	\$208.65
<input type="checkbox"/> Non-Member	\$300 + \$21.00 GST	=	\$321.00
<input type="checkbox"/> Articling / Bar Ad OBA Student Member	\$95 + \$6.65 GST	=	\$101.65

I can't attend, but send me the course materials.

Issues in Charity Law: A Pot Pourri 02CHA1022C

<input type="checkbox"/> OBA Member	\$75.00 + \$5.25 GST	=	\$80.25
<input type="checkbox"/> Non-Member	\$100.00 + \$7.00 GST	=	\$107.00

Fee categories	Member:	A member in good standing of the Ontario Bar Association
	Non-Member	
	Student Member:	Law Student, Articling and Bar Admission Candidate

Location

OBA Conference Centre, Suite 200 – 20 Toronto St., Toronto (just north of the King Edward Hotel)

Wheelchair access: Through the Counsel Court Building on Adelaide Street East, between Victoria and Toronto Streets.

Registration Policy

Registrations must be prepaid. Registrations will be accepted by FAX at (416) 642-0424, by TDX (Box #104) and at the Ontario Bar Association address shown on the Registration Form. A credit card number **MUST** accompany all faxed registrations. **Walk-in registrations** will be accommodated **ONLY IF ACCOMPANIED BY CREDIT CARD OR CHEQUE**. Seating and meal preference, if applicable, will be given to pre-paid registrants.

Refunds and Cancellations

Course fee is refundable (less \$50.00 plus \$3.50 GST) if notice is received in writing five business days before the course. We reserve the right to cancel or reschedule courses, refuse admission, or change speakers, location or content. NO REFUNDS will be made if notification is received AFTER October 15, 2002. Please note that an OBA member in the same category may attend in your place. If the delegate is NOT an OBA member s/he will be required to pay the difference in fee. The OBA GST registration number is R100760495

Tuition receipts for government lawyers

Ontario Bar Association is now certified as an Educational Institution, allowing us to issue tuition receipts for CLE registration fees (exclusive of meal and publication costs) to salaried lawyers who cannot claim fees as a business expense. This new tax credit is expected to be particularly advantageous to government lawyers.

OBA BURSARY

The OBA Bursary program provides registration at reduced prices to OBA members in good standing. Regular members who qualify and wish to participate in the OBA Bursary program are required to submit a fully completed application to OBA reservations staff. Applicants should indicate their year of call and that their pre-tax income is less than the pre-tax threshold of \$35,000. For more information contact Cindy Ng at (416) 869-1047 or toll free 1-800-668-8900, ext. 407

Can't make the course?

Order the course material!

Concise, practical, and well-focused course materials and/or precedents written by the faculty will be provided to all registrants on the day of the course. The course materials are also available for sale separately (topic may vary slightly from presentation).

Co-Chairs:
Glenn M. Davis,
Sun Life Financial
Marketing Consultant,
Estate Planning

M. Jasmine Sweatman,
Miller Thomson LLP

Phone
1-800-668-8900
(416) 869-1047

Have your credit card handy.

Fax
(416) 642-0424

Credit card number **MUST** accompany faxed registrations.

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Visit our Web site:
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300-20 Toronto St.
Toronto, Ontario
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Charity & Not-For-Profit Law

Issues in Charity Law: A Pot Pourri

Program Highlights:

- Incorporation/Registration/Governance
- Estate Administration
- Estate Accounting
- Estate Litigation
- Estate ADR/ Mediation
- Tax Issues and the CCRA
- Bill C-36
- *Christian Brothers* decision

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Ontario Bar Association
Conference Centre
Suite 200-20 Toronto Street, Toronto
A Branch of the Canadian Bar Association



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Issues in Charity Law: A Pot Pourri

- 8:15 a.m. Registration Opens
- 9:00 a.m. Introductory Remarks
Glenn M. Davis, Sun Life Financial Marketing Consultant, Estate Planning
M. Jasmine Sweatman, Miller Thomson LLP
- 9:10 a.m. **Incorporation/Registration/Governance**
- *Ontario v. Federal* incorporation
 - The role of the Public Guardian and Trustee
 - Submitting applications to CCRA
 - Structuring a board
 - Good practices and compliance
 - *Charities Accounting Act*
- Clifford S. Goldfarb**, Gardiner Roberts LLP
- 9:25 a.m. **Estate Administration**
- Charity as beneficiary
 - Obligations of estate trustee
 - Expectations of charitable beneficiaries
 - Advising the charitable beneficiary
 - Application of *Saunders v. Vautier*
- Janet A. Clark**, Harrison Pensa LLP - London
- 9:40 a.m. **Estate Accounting**
- Passing of accounts - form and content
 - Reviewing accounts - checklist
 - What to ask, what to look for, how to respond
- Jennifer J. Jenkins**, Jenkins & Newman - Whitby
- 9:55 a.m. **Estate Litigation**
- Charity as litigator
 - Advising the charitable client
 - Duties and obligations of charity as litigant
 - Remedies under the *Rules of Civil Procedure*
- Jeffrey M. McEown**, Keel Cottrelle
- 10:10 a.m. **Estate Alternative Dispute Resolution/ Mediation**
- Rule 75.1 of the *Rules of Civil Procedure*
 - Advising the charitable client
 - Duties and obligations of charity as designated party
 - Good practices
- Kathleen J. Kelly**, Kelly ADR Services
- 10:25 a.m. Break

- 10:45 a.m. **Tax Issues and the CCRA**
- Maintaining registration status
 - Disbursement quota
 - Receipting
 - Foreign activities
 - Avoiding private foundation status
- Robert B. Hayoe**, Miller Thomson LLP
- 11:05 a.m. **Bill C-36: Anti-Terrorism Legislation**
- Money laundering and the organization
 - Anti-terrorism funding and the organization
 - Pit-falls, red flags and blinders
- Terrance S. Carter**, Senior Partner, Carter & Associates - Orangeville
- 11:20 a.m. **Privacy Legislation and Issues**
- Federal legislation
 - Provincial legislation
 - Practical effects on charities and not-for-profits
- William T. Pashby**, Borden Ladner Gervais LLP
- 11:45 a.m. **Christian Brothers Decision: Then and Now**
- Regime before *Christian Brothers*
 - Implications of *Christian Brothers*
 - How the regime has changed
 - Practical effects from charitable and advisors' points of view
- Malcolm D. Burrows**, Hospital for Sick Children Foundation
Timothy G. Youdan, Davies Ward Phillips & Vineberg LLP
- 12:15 p.m. **Fund Raising**
- Ethical considerations
 - Use/referral of advisors
 - Policies and procedures
 - Reasonable costs/ expenses of fundraising - recent case law
- Cristina DeCaprio**, Juvenile Diabetes Research Foundation - Markham
- 12:30 p.m. **Voluntarism**
- Managing legal risks and liabilities
 - Recruitment and screening
 - Policies and procedures
 - Union issues
 - Volunteer obligations to organization
 - Training and management
 - Insurance
- Rachel Blumenfeld**, Miller Thomson LLP
- 12:30 p.m. Questions
- 1:00 p.m. Program Concludes



This half-day CLE course contains approximately 3 ½ hours of instruction.