

**Professional Advisors
Accessible & Updated
Website Resources**

[Our Advantages](#)

[Options for
Your Clients](#)

[Tools](#)

[Annual Fund Costs](#)

[Investment
Management](#)

[Approaches
to Giving](#)

[Family Philanthropy](#)

[Request e-newsletter](#)

[Request Information](#)

 Professional Advisors
e-Resource:

A toolkit for helping
clients achieve their
philanthropic goals.

Contact Us

The Calgary Foundation
700 - 999 8th Street SW
Calgary AB CAN T2R 1J5

403 802 7700
info@thecalgaryfoundation.org

[Click here](#) to add a contact who
would appreciate receiving this
newsletter.



Focus on Philanthropy is a tri-annual Newsletter about charitable gift planning edited and produced by The Calgary Foundation (TCF). It is distributed to professional advisors in Calgary and surrounding area.

TCF's e-bulletin of February 13, 2008 released new information on the possibility of changes from Canada Revenue Agency (CRA) as to the valuation of a gift of an existing insurance policy.

The following articles present unique perspectives and case examples and a written opinion from CRA.

**An Analysis of New CRA
Position on Gifting of Life
Insurance Policies**

By Glenn R. Stephens
PPI Financial Group

**CRA Makes Gifting of
Existing Insurance Policies
More Attractive To Donors**

By DeWayne Osborn
Lawton Partners

**CRA Opinion - Gift of a Life
Insurance Policy**

CRA responds to DeWayne
Osborn's inquiry on the
determinants of fair market value
of life insurance policies.

Sponsorship of this
e-newsletter
provided by



SAVE THE DATE

Thursday, May 22, 2008

5:30 - 9:00 pm

Dinner & Presentation

Calgary Stampede, Palomino Room

**Wealth and the
Family**

Maximizing Use of
Retained Earnings Investments to
Benefit Clients, Families & Community

Derek Thompson, FSA, FCIA

Estate Planning Advisor
Raymond James Financial Planning



Watch for your e-vite coming soon

For more info contact:

Lally Pirbhai

Director, Gifts & Donor Relations

[lpirbhai@](mailto:lpirbhai@thecalgaryfoundation.org)

thecalgaryfoundation.org