



IMPORTANT UPDATES FOR CHARITIES AND NON-PROFIT ORGANIZATIONS

Chaired by

Michael Blatchford

Norton Rose Fulbright Canada LLP

New Date: **May 26th, 2022** • UBC Robson Square (800 Robson Street) • Vancouver, BC

Live Webinar also available!



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CHAIR



Michael Blatchford, Partner, Norton Rose Fulbright Canada LLP, Vancouver, BC. Michael is a partner with the global law firm Norton Rose Fulbright. He advises charities and not-for-profit organizations with regard to their tax-exempt status, governance and ongoing legal and regulatory obligations, including compliance under the *Income Tax Act*. He also advises donor and charities on philanthropy, planned giving, social enterprise and receipting issues for charities, and has assisted numerous Canadian charities to carry out their work abroad.

FACULTY



Kate Braaten, Associate, Norton Rose Fulbright Canada LLP, Vancouver, BC. Kate Braaten is an associate in the Business Law group at Norton Rose, and is building a practice serving clients in the charitable and tax-exempt sector, including registered charities, not-for-profit organizations, professional bodies and other entities. She assists senior counsel in advising clients on a variety of matters, including charitable registration, governance, fundraising and tax.



Sarah Fitzpatrick, Partner, Miller Thomson LLP, Vancouver, BC. Sarah Fitzpatrick's practice focuses on the areas of charities, not-for-profits, and trusts. She provides general practical legal advice to these clients, to assist them in carrying out their missions and mandates. Sarah counsels charities and not-for-profit clients on governance matters, tax and regulatory compliance, social enterprise and gift planning. She also assists clients with general corporate legal matters including major transactions and restructuring. Sarah is an active member in the community. She is currently the Co-Chair of the Canadian Bar Association, British Columbia Charities and Not-for-Profit Law Subsection.



Luke Johnson, Partner, De Jager Volkenant, Surrey, BC. Luke provides legal advice to charities, non-profit organizations, businesses and individuals in the areas of charity law, corporate/commercial law, and wills and estates. His practice covers a broad range of services, including charity governance and organization, charity compliance audits, corporate reorganizations, and business transactions. Luke represents organizations across the voluntary sector including churches, private foundations, housing providers, schools, and international development agencies. Luke was admitted to the British Columbia Bar in 2008, and has been with De Jager Volkenant since.



Nejeed Kassam, CEO and Co-founder, Keela, Vancouver, BC. Nejeed Kassam has spent 30 years working in and around the nonprofit sector and is proud to work every day to build stronger communities. Nejeed is the CEO and founder of Keela – an impact technology company, dedicated to empowering nonprofits with powerful software. He was educated at McGill University (B.A.) and Osgoode Hall Law School (JD). Called to the Bar in Ontario in 2015 and in British Columbia in 2017, Nejeed is also the founder of the Better Canada Initiative, Believe Vancouver, and KIT for Nonprofits. He is the former executive director of both End Poverty Now and Conversations for Change.



Brian Milne, Partner, Norton Rose Fulbright Canada LLP, Calgary, AB. Brian Milne practises in the areas of Canadian tax and charity law. He regularly advises public and private businesses and their investors on acquisitions, financing, cross-border structuring and the design of employee compensation plans. He also frequently advises charitable and non-profit organizations on a wide range of matters, including charitable gifting and the structuring of developments using charitable assets.



Rhys Volkenant, Associate, De Jager Volkenant, Surrey, BC. Rhys joined De Jager Volkenant in January 2021 after articling and working as an associate lawyer at a mid-sized firm in downtown Vancouver. Rhys currently practises in the areas of business law, non-profit law, charity compliance, education law and real estate. Rhys' clients include a broad range of charities and non-profit organizations and he thoroughly enjoys the opportunity to assist organizations that carry out impactful work both locally and internationally.

IMPORTANT UPDATES FOR CHARITIES AND NON-PROFIT ORGANIZATIONS

The financial and regulatory environment places increased demands on charity and non-profit boards. To best meet these demands, directors and officers must have a clear understanding of their responsibilities and of the changing regulatory landscape. This will have a significant impact on the success and survival of the organization.

To assist you in carrying out your role proficiently, this forum assembles experts in the field of non-profit law to examine the latest changes and emerging issues, and to provide you with the tools you need to succeed.

KEY ISSUES TO BE ADDRESSED:

- A primer on tax issues for charities and NPOs
- An update on recent relevant caselaw affecting your organization
- A primer on tax issues involving donations of shares
- Recent changes to BC's lobbying rules and the Societies Act
- The function of donor-advised funds
- The growing issue of cryptocurrency donations

WHO SHOULD ATTEND?

- Directors and officers of charities and non-profit organizations
- Lawyers, accountants, consultants and other professionals advising charities and non-profit organizations
- Management professionals involved in charities and non-profit organizations
- Individuals, businesses and advisors of those seeking to attain charitable or non-profit status

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MAY 26TH, 2022

9:00 Welcome and Introduction by PBLI

9:05 Chair's Welcome and Introduction

Michael Blatchford

Norton Rose Fulbright Canada LLP

9:10 Case Law Update

Luke Johnson

De Jager Volkenant

- An overview of recent court decisions
- Decisions from the Civil Resolution Tribunal
- The impact of recent caselaw on your charity or NPO

10:00 Questions and Discussion

10:10 Refreshment Adjournment

10:25 Charity Tax Issues Involving Shares

Sarah Fitzpatrick

Miller Thomson LLP

- An overview of the rules for charities acquiring private and public company shares
- Discussion of the non-qualifying security rules and the recent *Odette (Estate) v The Queen*, 2021 TCC 65

11:15 Questions and Discussion

11:25 Lobbying Registration Rules in BC

Kate Braaten

Norton Rose Fulbright Canada LLP

- Recent changes to BC's lobbying rules: what you need to know

12:15 Questions and Discussion

12:25 Catered Lunch

1:15 Updates for Charities from the 2022 Federal Budget/Endowments and Donor-advised Funds

Michael Blatchford

Norton Rose Fulbright Canada LLP

- Endowments
- Donor-advised funds

2:05 Questions and Discussion

2:15 Refreshment Adjournment

2:30 Recent Amendments to the Societies Act

Rhys Volkenant

De Jager Volkenant

- Summary of amendments
- Amendments of note, including:
 - Protecting member information
 - Record-keeping and disclosure rules
 - Dissolution
- Impact on societies in BC

3:20 Questions and Discussion

3:30 Cryptocurrency Donations

Nejeed Kassam

Keela

Brian Milne

Norton Rose Fulbright Canada LLP

- Handling donations in cryptocurrency

4:20 Questions and Discussion

4:30 Chair's Closing Remarks

4:35 Program Concludes

INFORMATION

Four Ways to Register:

1. Telephone us: 604-730-2500 or toll free 877-730-2555
2. Fax us: 604-730-5085 or toll free 866-730-5085
3. Mail your registration form with payment
4. Register at www.pbli.com/charities22

Registration: The registration fee for in-person attendance is \$795.00 plus GST of \$39.75 totalling **\$834.75**. The registration fee for webinar attendance is \$695.00 plus GST of \$34.75 totalling **\$729.75**. Registration fee covers your attendance at the program, electronic materials, a boxed lunch and refreshments throughout the day.

Early Bird Discount: For in-person attendance, register by April 26th, 2022 and receive a \$100 discount on the registration fee (\$695.00 plus GST). Early Bird Discount does not apply to webinar attendees. Discounts cannot be combined.

NPO Discount: Directors, officers and employees of charities and NPOs are eligible for a 50% discount (\$397.50 + \$19.88 totalling \$417.38 for **in-person**; \$347.50 + \$17.38 totalling \$364.88 for **webinar**). Use discount code **NPO50** to receive this discount. Discounts cannot be combined. Please include your title and organization name on the form below to verify eligibility.

Group Discount: Register four persons from the same organization at the same time and you are entitled to a complimentary fifth registration. Discounts cannot be combined.

Payment: You may pay by VISA, MasterCard or cheque. Cheques should be made payable to the Pacific Business & Law Institute. Registration fees must be paid prior to the program.

When and Where: Check-in begins at 8:30 a.m. The program starts at **9:00 a.m. (PDT)**. **Provincial health regulations will apply.** UBC Robson Square is located at the basement level of **800 Robson Street** in Vancouver, BC. Please visit <http://robsonsquare.ubc.ca/find-us/> for directions.

Materials: The faculty will prepare papers and/or other materials explaining many of the points raised during this program. Please contact us at registrations@pbli.com if you are unable to attend the program and wish to purchase a set of electronic materials.

Your Privacy: We will keep all information that you provide to us in strict confidence, other than to prepare a delegate list containing your name, title, firm and city for our faculty and the program delegates. We do not share our mailing lists with any non-affiliated organization.

Cancellations/Transfers: Refunds will be given for cancellations or transferring registration from in-person to webinar (less a \$60.00 administration fee) if notice is received in writing five full business days prior to the program (**May 18th, 2022**). After that time we are unable to refund registration fees. Substitutions will be permitted. We reserve the right to cancel, change or revise the date, faculty, content, availability of webinar or venue for this event.

Course Accreditation: Attendance at this course can be listed for up to **6 hours** of continuing professional development credits with the Law Society of BC.

Registration Form

Pacific Business & Law Institute

Unit 2 - 2246 Spruce Street
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May 26th, 2022

UBC Robson Square, 800 Robson Street, Vancouver, BC

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