

## Charity Law Primer

*Charity and Not-for-Profit-Law / Young Lawyers Division*



In-Person



Webcast

**Date:** Friday, April 5, 2019 | 9:00 am to 12:30 pm

**Location:** OBA Conference Centre  
20 Toronto Street, 2<sup>nd</sup> Floor, Toronto

**Program Chairs:** **Robert B. Hayhoe**, Miller Thomson LLP  
**Thomas Kurys**, Wilson Lue LLP  
**Brittany Sud**, Fasken Martineau DuMoulin LLP

**Professionalism Hours:** This program contains **1h 00m**  
**Substantive Hours:** This program is eligible for up to **2h 30m**



*The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario.*

Have you been assigned your first charity or not-for-profit file and you don't know what to do? Perhaps your first file was a complete flop. Maybe you had a good result, but know you can be better. At this half-day program, prominent practitioners will share their time-tested strategies and practical advice on a variety of important topics. Register now to secure your spot. We look forward to seeing you there!

<p>8:30 am Registration and Coffee</p> <p>9:00 am Welcome and Opening Remarks</p> <p>9:05 am <b>Your First Opportunity to Sit on a Charity Board</b> <b>Robert B. Hayhoe</b>, Miller Thomson LLP</p> <ul style="list-style-type: none"> <li>• Policy</li> <li>• Fundraising</li> <li>• Factors to consider:               <ul style="list-style-type: none"> <li>○ Reputation of charity</li> <li>○ Age of charity</li> <li>○ Length of service</li> </ul> </li> <li>• Following Bylaws</li> <li>• Committees</li> <li>• What are your duties, responsibilities and powers?</li> <li>• Are you exposed to personal liability?</li> <li>• Liability insurance</li> </ul> <p>9:35 am <b>Process for Incorporating an Organization or Not-for-Profit Company</b> <b>Natasha K. Smith</b>, Miller Thomson LLP</p> <ul style="list-style-type: none"> <li>• Where to incorporate?               <ul style="list-style-type: none"> <li>○ Federal or provincial</li> </ul> </li> <li>• What documents do you have to file?               <ul style="list-style-type: none"> <li>○ Articles of incorporation</li> <li>○ Initial registered office and first board of directors</li> <li>○ Name search report</li> <li>○ Filing fee</li> </ul> </li> </ul> <p>10:05 am <b>Your First Charitable Registration with CRA</b> <b>Alexandra Tzannidakis</b>, Drache Aptowitz LLP (Ottawa)</p> <ul style="list-style-type: none"> <li>• Should you apply for charitable registration?</li> <li>• Advantages and obligations of registration</li> <li>• How to apply</li> <li>• Application review process</li> <li>• Charitable purposes and activities</li> <li>• Consequences of not meeting the obligations for registration</li> </ul>	<p>10:35 am Networking Break</p> <p>10:50 am <b>Top Compliance Issues for Charities:</b> <b>What you need to know</b> <b>Mark Blumberg</b>, Blumberg Segal LLP <b>Adam Greco</b>, Blumberg Segal LLP</p> <ul style="list-style-type: none"> <li>• <i>Income Tax Act</i> requirements for Charities</li> <li>• Provincial oversight and regulation</li> <li>• Recent developments</li> </ul> <p>11:20 am <b>Practice Management Tools</b> <b>Terrance S. Carter</b>, Carters Professional Corporation <b>Ryan Prendergast</b>, Carters Professional Corporation</p> <ul style="list-style-type: none"> <li>• Analyzing the client-lawyer relationship</li> <li>• Considerations in a <i>pro bono</i> arrangement</li> <li>• Conflicts of Interest in Advising a Charity</li> </ul> <p>11:50 am <b>Top 10 Tips and Takeaways</b> <b>Mark Goldbloom</b>, General Counsel &amp; Chief Risk Officer, SickKids Foundation <b>Pamela Shin</b>, Associate Director, Legal Counsel, Mastercard Foundation</p> <p>Gain insider information from experienced practitioners on common pitfalls and how to avoid them. Come prepared with your questions.</p> <p>12:20 pm Q&amp;A and Closing Remarks</p> <p>12:30 pm Program Concludes</p>
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**PROGRAM REGISTRATION IS ONLINE** [www.oba.org/pd](http://www.oba.org/pd)

Questions? [pd@oba.org](mailto:pd@oba.org)