



Recent articles and presentations of interest to professionals

- **Don't Waste this Crisis!** : Teresa Easler (March 2009) **NEW!**
 - **The Bottom Line: Enhancing Cash Flow Charitably** (November 2008)
 - **The Bottom Line: The Federal Budget and Marketable Securities** (February 2008)
 - **The Bottom Line: The BCE Buyout- A philanthropic opportunity** (July 2007)
 - **The Bottom Line: The 2006 Budget and Capital Gains** (May 2006)
 - **The Bottom Line: Update on Charity Tax Shelters** (May 2005)
 - **Gifting Private Company Preferred Shares:** Robert A. Kleinman FCA (January 2005)
 - **Gifts of Preferred Shares: Valuation;** Richard M. Wise FCA (January 2005)
 - **Private vs Public Foundations:** JCF PAC members (December 2004)
 - **New Penalties for Charities:** Robert Kleinman FCA (December 2004)
 - **Nouvelles pénalités:** Robert Kleinman FCA (December 2004)
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- **The Bottom Line - Update on Tax Deadlines for Charities** (October 2004)
 - **The Bottom Line - Update on Federal Budget and charities** (March 2004)
 - **The Bottom Line - Update on Tax Shelters** (January 2004)
 - **The Bottom Line - Update on Election Changes** (January 2004)
 - **The Bottom Line - Update on Tax Shelter Donations** (December 2003)
 - **The Bottom Line - Charities Beware!** (April 2003)
 - **The Bottom Line - Update on split receipting** (January 2003)
 - **The role of the Professional Advisor in Philanthropy** (March 2003)
 - **Legacy Planning-Matching Product to People:** Robert Kleinman FCA (March 2003)

From the 2008 Seminar

- **From My Perspective;** Ned Goodman
- **Charitable Giving and Marketable Securities;** Robert Kleinman FCA
- **Tax Planning at the Frontier;** Robert Raich

From the 2006 Seminar:

- **Family Succession:** Jack Bernstein

- **The Current State of GAAR;** Jerry Wise CA
- **Post Mortem Estate Planning;** Robert Raich
- **New Rules for Gifting Marketable Securities;** Robert A. Kleinman FCA

From the 2004 Seminar:

- **2004 Case Study**
- Power point presentation
- **Individual Pension Plans** James Friedman
- **Wills checklist** Marilyn Piccini Roy

From the 2003 Seminar:

- **Tax Potpourri** Mark Brender/Mitch Stein
- **Topical Tax Issues** Mark Brender
- **Gift of Preferred Shares** Robert Kleinman FCA