

The Association of Treasurers of Religious Institutes
presents the
28th Annual Conference

“Let the River Flow”



Date: September 25-28, 2015

Place: Delta Bessborough Hotel

601 Spadina Crescent East, Saskatoon, SK

Hotel Registration call-in number: 1-888-890-3222

(Internet registration link): <https://www.deltahotels.com/Groups/Delta-Bessborough-Groups/Association-of-Treasurers-for-Religious-Institutions>

Dear Registrant:

Welcome to ATRI's 28th Annual Conference: We will be exploring the theme— *Let the River Flow*. This theme reflects the ups and downs; the depths and unexpected curves we face in our ministry of finance. Sister Lynn Levo, CSJ will ground our conference highlighting how we can have a “balanced” approach in these challenging times. Sister Bonnie MacLellan, CSJ will close our conference with her insights and reflections. We will also offer practical workshops to assist and challenge us in our various ministries as treasurers, leadership and financial people in our religious communities

This year the following will be included in your registration fee thanks to the generosity of the many sponsors of our conference:

- 1 Substantial Social (**this will be on Friday night so please eat a “Lite” supper**)
- 3 Breakfasts
- 4 Nutrition Breaks
- 2 Lunches
- Reception, Banquet and Entertainment
- Box lunches available on Monday for those who request them (see registration form)
- General Conference Costs

Conference Registration Fees:

Before August 7, 2015:	\$ 350.00 (for the 1st person)
	\$ 300.00 (for the 2nd person)
	\$ 275.00 (for any additional people)
After August 7, 2015:	\$ 375.00
Non-Member:	\$ 400.00

Deadline for Registration: August 7, 2015

EARLY BIRD DRAW!!!!

EARLY BIRD SPECIAL!!! Those who register at the Delta Halifax before **JULY 10, 2015** will have their names placed in a draw for accommodations for one complimentary night for two at the Delta Bessborough Hotel, in a standard Mode room, gift certificate.

Conference Speakers



Sister Lynn Levo, CSJ, Ph.D., a Sister of St. Joseph of Carondelet, is a licensed psychologist, lecturer and consultant. She received her Ph.D. from the University of New York at Albany, completing her clinical training at the University of Kansas School of Medicine.

Lynn consults with religious congregations of women and men, dioceses and health systems on mutuality, transitions and stress, anger, managing conflict, aging and healthy personal, sexual and spiritual development across the life span. Lynn has presented nationally and internationally to women and men religious, intercommunity novitiates and seminaries, on fostering healthy integrated sexuality, celibacy, relationships, intimacy, mutuality in community, emotional intelligence, collaborative leadership, hope, living at the edge of chaos and the call to be evolutionaries. In addition, Lynn also facilitates team development for several leadership teams of women religious, utilizing her experience as a former congregational leader and consultant.

After completing 12 years of ministering as Director of Education at Saint Luke Institute, a residential treatment facility for women and men religious, Lynn currently is a Consulting Psychologist in private practice, offering consultations and presentations/workshops in both the U.S. and abroad.

Sister Lynn's presentations will focus on:

"Let the River Run : Our Opportunity To Create a New Jerusalem"—We live and minister in a time of chaos, endings and the unknown – what has been is no longer working and what is to come is unknown. We have an opportunity to dream, to wake up and create new ways of **being** – to create a preferred future. The choice is ours.

Together we will focus on developing a new consciousness – a new way of seeing, serving and leading. Principles for creating an evolutionary climate and for being an evolutionary and transforming presence will be explored.



Sister Bonnie MacLellan, CSJ is the General Superior of the Sisters of St. Joseph of Sault Ste. Marie. Born in Sudbury, Ontario, Bonnie graduated from the Sudbury Regional School of Nursing and was employed by the International Nickel Company prior to entering the convent. She worked in hospitals in Blind River, Elliot Lake, Sudbury and Thunder Bay, and has served on a number of Boards including the Catholic Health Association of Ontario, the Catholic Health Sponsors of Ontario, the United Way, and Confederation College. Her education includes a Bachelor's degree in Religion & Psychology; Master of Public Health; Master in Human and Organizational Development; Doctor of Philosophy in Human and Organizational Systems, Licentiate in Canon

Law, and is currently a Canon Law doctoral candidate at Saint Paul University. She has served as adjunct faculty at the University of Minnesota and Laurentian University. Along with her current ministry as General Superior, Bonnie is currently serving as the executive director of the Centre for Canonical Services, Saint Paul University.

Sister Bonnie's presentation will link with Sister Lynn's presentations by reflecting on:

"I will open up rivers on the bare heights ... and turn the desert into a marshland..."

(Isaiah 41: 18)

WORKSHOP PRESENTERS

Beste Alpargun—joined SEAMARK in 2009. She is responsible for implementing the portfolio strategies in individual and institutional client accounts as well as managing fixed income portion of all client portfolios. She contributes to the team's overall strategy mainly in the fixed income area. Her 23 years of experience is primarily in investment analysis, company research and valuations. She held senior research analyst and head of research positions at some of the largest investment banks in Turkey. Since relocating to Canada in 2000, she has conducted investment research for two local boutique firms and was also involved in the administration, compliance and senior management of these companies. A graduate of Bogazici University, Istanbul, Turkey, Beste also holds an MBA degree from Dalhousie University, Halifax, NS. She holds the Chartered Financial Analyst (CFA) designation and a past president of the Atlantic Canada CFA Society. Beste teaches part-time finance course at St. Mary's University since 2009.

Terry Carter, B.A., LL.B, TEP, Trade-mark Agent – Managing Partner of Carters—Mr. Carter practices in the area of charity and not-for-profit law, is counsel to Fasken Martineau on charitable matters. Mr. Carter is a co-author of Corporate and Practice Manual for Charitable and Not-for-Profit Corporations (Carswell), a co-editor of Charities Legislation and Commentary (LexisNexis Butterworths, 2015), and co-author of Branding and Copyright for Charities and Non-Profit Organizations (2014 LexisNexis Butterworths). He is recognized as a leading expert by Lexpert and The Best Lawyers in Canada, and is Past Chair of the CBA National and OBA Charities and Not-for-Profit Law Sections. He is editor of www.charitylaw.ca, www.churchlaw.ca and www.antiterrorismlaw.ca.

Karen Cooper—A partner with the firm, Drache Aptowitzer LLP, Ms. Cooper is recognized as a leading expert by *Lexpert* and *Best Lawyers* practicing charity and not-for-profit law with an emphasis on tax issues at Drache' Ottawa office, having formerly been a Senior Rulings Officer with the Income Tax Rulings Directorate of Canada Revenue Agency, as well as former counsel for the Department of Justice in tax litigation. Ms. Cooper also has considerable teaching experience, including as part-time professor at the University of Ottawa, Faculty of Common Law, and is a contributing author to *The Management of Charitable and Not-for-Profit Organizations in Canada* (LexisNexis Butterworths).

Gary Hawton—is President of Oceanrock Investments Inc. and is a leader in the Canadian socially responsible investing arena. Most noteworthy is his ground-breaking engagement with the top 5 Canadian banks for "say-on-pay" shareholder voting. After nearly a decade advocating on behalf of investors as the Chief Executive Officer of Meritas Financial Inc., Gary joined OceanRock in April 2010 as President. During his tenure with Meritas, Gary was responsible for the launch, growth and development of the Meritas Mutual Funds, one of Canada's leading socially responsible fund families. Gary is a member of the executive of the Responsible Investment Association and the retiring board chair. Among his other volunteer activities is his participation on the Investment Committee of the Friends of the Greenbelt Foundation. In June 2012 Gary received the Canadian SRI distinguished service award, a lifetime achievement award given to a person who has made an outstanding contribution to the Canadian socially responsible investment industry through their leadership, commitment, initiative, innovation, collaboration and/or impact in advancing industry growth and recognition. Prior to joining Meritas in September 2000, Gary held various executive management roles in the investment industry including online and full service brokerage providers, and long-term service with one of Canada's big 5 banks. Gary received a Bachelor of Business Administration from Wilfrid Laurier University and holds both the Canadian Investment Manager and Chartered Financial Analyst designations.

Anne Marie Jackson—has extensive experience as a leader of global justice education and action, having worked for many years with Development and Peace as regional facilitator, program coordinator and then director. She is Director of the Jesuit Forum for Social Faith and Justice.

Conference Speakers continued

Bev Johnson and Tom Zurowski—Bev is a CPA, CA has worked with owner managed businesses, not for profit organizations and charities including religious orders providing tax, accounting and advisory services for over 30 years.

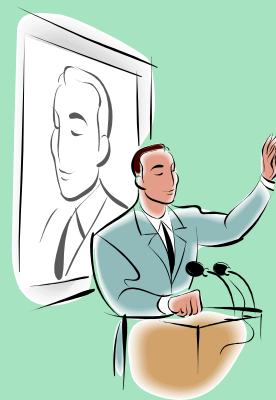
Tom is a CPA, CA has worked with owner managed businesses, not for profit organizations and charities including religious orders providing tax, and advisory services for over 30 years.

Rita Larivee, SSA—Congregational leader of the Sisters of Saint Anne since 2008, former publisher of the National Catholic Reporter, Ph.D. in Theology and Christian Ethics, Member of the CTSA (Catholic Theological Society of America), Member of SCE (Society for Christian Ethics)

Joy Mendel—is a Bioethicist for St. Paul's Hospital and Catholic Health Association of Saskatchewan. Before coming to Canada she worked for Mater Health Services, a group of seven Brisbane Hospitals. Joy has interests in all areas of ethics including end of life, beginning of life and social justice issues.

Taylor Shurie—is a Technical Publisher and Web Specialist for J&S Publishing. She has over 15 years' experience in the publishing industry. Taylor works with private and public sector clients and is used to working in high security environments and dealing with sensitive material.

Jacqueline Small—is the Director, Human Resources and Operations for the Sisters of the Presentation, NL. She provides daily support to the Sisters and their employees. She is responsible for recruitment and retention of employees, employee performance management, ensuring labor and employment legislation compliance, payroll and benefits administration and workplace operations. She is an active member of the HRPNL (Human Resource Professionals of NL) and the NLEC (NL Employers Council).



WORKSHOPS

1. "PREPARING FOR AND SURVIVING A CRA AUDIT"—Terry Carter

This session is a not to be missed topic about how to prepare for and "live to tell the tale" of a CRA audit. Learn about why your congregation should be concerned, what is involved in the CRA audit process, how to prepare for an audit, and what issues can arise during an audit that your congregation needs to be aware of before the CRA auditor comes to call.

2. "STRATEGIC APPROACH TO WORKFORCE PLANNING"—Jacqueline Small

Strategic Workforce Planning supports organizational stability and sustainability by ensuring that there is an established process to meet staffing requirements. When the employee relationship is coming to an end, for whatever reason, the employer has opportunities and responsibilities in managing this process. In this presentation, we will look at common Downsizing Strategies, Key Activities that we should include, Best Practices for managing the process and Practices to Avoid when downsizing. As we look to the future, with many Congregations in various stages of diminishment, we must find and strike a balance between current and future staffing requirements.

3. "RISK BUCKETS –MANAGING INVESTMENT RISK BY USING PORTFOLIO DIFFERENTIATION"—Beste Alpargun

Boards and investment committees of foundations, endowments and charities are faced with a responsibility to minimize the risks of their investment decisions. Beyond geographical and industrial categorization, the division can be made according to the risk levels. Our attempt is to help bridge the gap between fund sponsors and money managers in understanding risk parameters. This workshop will explore—the Risk profile including definition and practical use in investment decision making and Risk buckets: Low Volatility, Mid Volatility and High Volatility followed by a conclusion.

4. "REPEAT OF WORKSHOP #1—"PREPARING FOR AND SURVIVING A CRA AUDIT"— Terry Carter

5. "INTERNET SECURITY: PROTECTING YOURSELF IN THE DIGITAL AGE"—Taylor Shurie

This workshop will provide an overview of internet security; and will explore cyber security risks and how to protect Yourself, Your business and Your money.

6. "NAVIGATING REVENUE CANADA REQUIREMENTS FOR SUPPORTING WORKS OUTSIDE OF CANADA"—Rita Larivee, SSA

For many religious communities, supporting works by sending money outside of Canada using Revenue Canada requirements for charitable organizations can be a difficult process. This presentation will offer suggestions and examples of the process from the perspective of a congregational leader who has had to work her way through the steps. The goal of the presentation is simplify what can often seem like a complicated structure.

7. "ADVANCE DIRECTIVES, PROXIES AND THE CANADIAN ASSISTED SUICIDE AND EUTHANASIA DEBATE"—Joy Mendel

This presentation will cover advance directives, proxies, powers of attorney (an example in Saskatchewan law). The current euthanasia and assisted suicide debate will also be discussed in relation to the question 'What should be the Catholic response'.

8. "OUR MONEY IS OUR MINISTRY"— Anne-Marie Jackson

Is our ministry about money or about life? Anne-Marie will lead a discussion on the covenant economy, using the book, "Living with limits, Living well", produced by the Jesuit Forum. The sharing will bring together themes of poverty and inequality as well as our threatened planet, reminding participants of the interconnectedness of all these issues. How we manage our money affects people and the Earth.

9. Workshop 9—(this time is set aside for Lay Collaborators only)— facilitated by Andy Praksas and Kathy Thumback

The lay-collaborators session will continue primarily as a "Question and Answer period", as issues confronting religious congregations today continue to arise and need to be addressed. New this year, the session will allow some time for:

- [1] addressing compliance in completing the US government W-8BEN form (relating to US ownership of stocks/property); and
- [2] allotting a period of about 10 minutes (or longer if time permits) to go over sections of the ATRI Resource Manual, which may require some explanation

10. "ESSENTIAL TAX AND CHARITY LAW UPDATE"—Karen Cooper

The tax and corporate law applicable to the operations of religious institutes have become increasingly complex. This session will provide the latest information regarding tax and corporate law changes impacting religious institutes and will include the following:

- an explanation of the practical implications of the new Canada Not-for-Profit Corporations Act (CNCA) and Ontario Not-for-Profit Corporations Act (ONCA)
- a review of recent changes to the Income Tax Act brought about by the federal government and changes in CRA policy including new guidance regarding ineligible directors and rules for donations
- And if time allows some Q & A's

11. "WHY ARE THOSE ACCOUNTANTS KEEPING YOU AWAKE AT NIGHT?"—

Bev Johnson and Tom Zurowski

This presentation will cover a variety of topics that charities and organizations need to consider going forward including:

- How do I figure out what the financial statements and accountants are saying? [translation services]
- I hear about strategic planning but it sounds overwhelming and mind boggling. How does strategic planning include a review and integration of all parts of my organization? [making sense of the world and where we are going]
- How do I keep up with all the changes in tax rules and which are the key things I need to know? [fear management]
- Now I am getting U.S. forms to fill out by me a Canadian....are you kidding me!! [more fear management]

12. "RESPONSIBLE INVESTING"— Gary Hawton

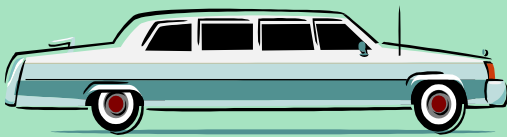
In a world where climate change, water scarcity and global supply chain issues dominate the news, investing has become a lot more challenging. Are your funds invested in companies whose actions conflict with the mission of your religious community and your faith? Are you having an impact on the behaviour of the companies in your portfolio? Integrating environmental and social criteria into the selection and management of investments is becoming a mainstream function of good investment practice, resulting in better, more informed investment decisions. Responsible investors can reduce risk, increase long-term returns and have a positive impact on society. Learn how to talk to your investment managers about integrating social and environmental criteria into your investment policy statements. If your service provider can't provide this service, learn how to interview a new service provider so that they can help you reduce risk and achieve both your financial and mission-based objectives and integrate responsible investment into that process.



**Travel Information from the Airport
(the hotel is about 20 minutes away)**



Taxi cost: flat rate approx. \$21.00 per car—one way (tip is extra).



Limousine cost approx. \$42.00 per car (one way)

Deadline for Registration: August 7, 2015

Withdrawal: If you are unable to attend, substitution is accepted with a written or fax notice to the ATRI Office by **September 4, 2015.**

Cancellation: Registration Fee less \$75.00 administration fee will be refunded if a written notice of cancellation is received in the ATRI Office no later than **September 4, 2015.**

Please send to:

ATRI

101 Thorncliffe Park Drive, #151

Toronto, ON M4H 1M2

Tel: (416) 429-7331 Fax: (416) 429-7356

E-mail: atris@look.ca Website: www.atri.on.ca

Hotel Information

YOU MUST REGISTER WITH

Delta Bessborough Hotel

Hotel Registration phone-in number: 1-888-890-3222

When booking by telephone please use the name Association of Treasurers of Religious Institutes to ensure you receive the appropriate rate and are included in the guestroom block

OR

You can also register via the internet at:

<https://www.deltahotels.com/Groups/Delta-Bessborough-Groups/Association-of-Treasurers-for-Religious-Institutions>

If you are arriving early or staying later for the conference please contact the hotel directly or register on-line so that you can receive a conference rate for the extra days.

This hotel is “smoke-free.”

The Delta Bessborough is offering a Conference rate of:

Standard Room (single or double): \$185.00 (plus taxes)

(Complimentary internet access in all of the bedrooms)

All reservations must be made by August 7, 2015 in order to guarantee a room at the Conference rate.

PLEASE NOTE: ALL RESERVATIONS MUST BE MADE THROUGH THE REGISTRATION NUMBER OR INTERNET INFORMATION PROVIDED ABOVE.

Check-in Time is 3:00 p.m. and Check-out Time is 12 noon. Guests arriving before 3:00 p.m. will be accommodated as soon as rooms become available.

PARKING: Parking is available next to the hotel for \$15.00 a day.

Conference 2015 Schedule

Friday, September 25, 2015

4:00-6:00 p.m.	Registration
7:00-8:00 p.m.	Welcome and Opening Ritual Social

Saturday, September 26, 2015

7:00-8:30 a.m.	Breakfast
8:40-8:50 a.m.	Announcements
8:50-9:15 a.m.	Prayers
9:15-10:15 a.m.	General Session--Lynn Levo, CSJ
10:15-10:45 a.m.	Nutrition break
10:50-11:50 a.m.	<u>Workshops</u>
12:00-2:00 p.m.	LUNCH
2:00-3:00 p.m.	<u>Workshops</u>
3:00-3:30 p.m.	Nutrition break
3:30-4:30 p.m.	AGM
4:40 p.m.	Walk to the Co-Cathedral for Mass
5:00-6:00 p.m.	Mass at the Co-Cathedral (Bishop D. Bolen) Supper on your own

Sunday, September 27, 2015

7:00-8:30 a.m.	Breakfast
8:40-8:50 a.m.	Announcements
8:50-9:15 a.m.	Prayers
9:15-10:15 a.m.	General Session—Lynn Levo, CSJ
10:15-10:45 a.m.	Nutrition Break
10:50-11:50 a.m.	<u>Workshops</u>
12:00-2:00 p.m.	Lunch and Lay Collaborators Lunch
2:00-3:00 p.m.	<u>Workshops</u>
3:00-5:00 p.m.	Tour/free time on your own
5:30 p.m.	RECEPTION AT THE HOTEL
6:00-8:30 p.m.	Banquet and Entertainment in the hotel

Monday, September 28, 2015

7:00-8:30 a.m.	Breakfast
8:40-8:55 a.m.	Announcements
8:55-9:55 a.m.	General Session--Bonnie MacLellan, CSJ
9:55-10:25 a.m.	Presentations and expressions of gratitude Closing Ritual
10:25 a.m.	Nutrition break and box lunches for those who are travelling

Departure and safe journey to all!!

Our Sponsors

Our Annual Conference has been sponsored by a number of companies and individuals who very generously supported our event. We are very grateful for their contributions and wish them well in all of their future endeavours.

Aberdeen Asset Management
Addenda Capital Inc.
Adroit Investments
Alec G. Henley Group
Baker Gilmore and Associates
BMO Nesbitt Burns
Bockstael Construction (1979) Limited
Brenner, McDonagh & Tortolani
Carters Professional Corporation
Castellum Capital Management Inc.
CIBC Asset Management Inc.
CIBC Wood Gundy
Deloitte
Dixon Mitchell Investment Counsel Inc.
Doherty and Associates Ltd.
Fiera Capital Corporation
Genus Fossil Free
Guardian Capital
Jarislowsky Fraser Limited
KPMG
Montrusco Bolton Investments Inc.
Mourning Glory Funeral
National Bank of Canada
Oceanrock Investments
Oikocredit
PriceWaterhouseCoopers
RBC Dominion--NL
RBC Wealth Management Dominion Securities (Peterborough and Ottawa)
RBC PH&N Investment Counsel Inc.
RBC Royal Bank
Renaissance Investments (CIBC Asset Management Inc.)
Scotia McLeod (Saint John, NB)
ScotiaMcLeod (Saskatoon, SK)
Seamark Asset Management (2013) Ltd.
Standard Life
UMC Investments
Vincent Dagenais Gibson LLP/s.r.l.



Entertainment will be provided by: “Little House on the Prairie” (L.O.O.P.)

Founded in 2012, A Little Opera On the Prairie, known to our supporters and audiences as "LOOP", is the brainchild of Founder and Artistic Director Anastasia Winterhalt who was recently short-listed for the 2014 Lieutenant Governor's Arts Awards "Leadership" Award by the Saskatchewan Arts Board.

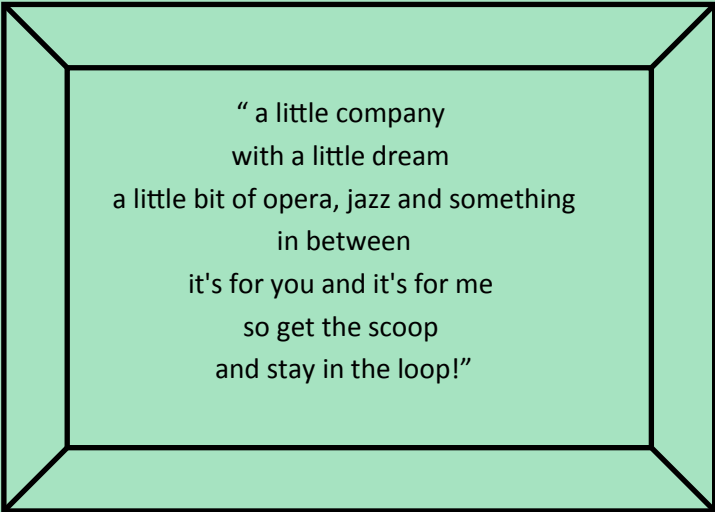
LOOP creates opportunities for local singers, offers opera in a variety of formats, fosters new and existing audiences, and tells great stories – both old and new!

Description

Innovative expression of opera and song presented in a unique way. LOOP is a little bit of opera, mixed with a lot of other! You might find us singing opera, or cabaret, or music theatre, or we might be working with your 10 year old as they write and produce an opera. You may even find us spreading our knowledge of how to get rid of a common cold without medication or hear us sharing stage fright remedies!

A little LOOP History

LOOP was launched in 2012, with the support of an ArtsSmarts grant from the Saskatchewan Arts Board. Working in partnership with Susan Reschny, Anastasia encouraged and supported school students as they wrote, performed and produced a 30-minute opera. The project helped to both break down classroom social barriers and inspire interest in opera and the arts among students. In September 2012, LOOP pulled together a team of performers from across the province to produce Dean Burry's opera, Isis and the Seven Scorpions, which received support through the Organization of Saskatchewan Arts Councils (OSAC). In December 2013, LOOP produced Hansel and Gretel. In February that year LOOP joined forces with Saskatoon's Live Five Theatre, Ritornello Chamber Music Festival and the Saskatoon Chefs' Association for the Chefs' Association Gala and Showcase, an evening of music, theatre, opera and culinary delights. Anastasia has also collaborated with many groups, including Saskatoon Summer Players Theatre, Trio Imagery and singer/songwriter Carrie Catherine.



“ a little company
with a little dream
a little bit of opera, jazz and something
in between
it's for you and it's for me
so get the scoop
and stay in the loop!”