GREATER CINCINNATI FDN.

CONNECTING PEOPLE WITH PURPOSE IN OH KY

Chartered Advisor in Philanthropy (CAP®) Program

The Chartered Advisor in Philanthropy (CAP®) Study Group Program at GCF is a year-long series of courses that teach professional advisors how to best help clients discover the legacies they will leave their families and community. By completing three graduate level CAP® programs and passing exams, participants will earn the Chartered Advisor in Philanthropy (CAP®) designation from the American College (Bryn Mawr, PA).

The CAP® provides professionals with the knowledge and tools needed to help clients reach their charitable giving objectives while also helping them meet their estate planning and wealth management goals. Convening participants in the professions of law, accounting, financial services, and planned giving, the program promotes an inter-disciplinary approach to most effectively achieve a client's goals.

Achieving the designation of Chartered Advisor in Philanthropy (CAP®) includes passing three graduate level courses and meeting in 18 class sessions. More than 1,900 individuals have been awarded the CAP® designation since its inception in 2003.

COST

For-profit professional advisors: $3,800 (includes all three courses)
Nonprofit professionals: $3,000 (includes all three courses)

COURSE DESCRIPTIONS

CAP® is made up of three separate courses that span roughly eight months with a one-month break between the three. Each course has a mandatory exam that you must score at 70% or higher to move on to the next course. Here are the course definitions:

GS839: Planning for Philanthropic Impact in the Context of Family Wealth. In this course you learn how clients and donors can use financial planning, estate planning, and gift planning to advance their personal financial goals for self and family, while also having a positive impact on their community.

GS849: Charitable Giving Strategies. In this course you learn how to explain and place the most common charitable strategies-both one by one and within an overall plan to achieve donor goals for self, family, and community.

GS859: Gift Planning in a Nonprofit Context. This course focuses on what nonprofits call "planned giving." The course is designed to help board leaders, advisors, and nonprofits collaborate to create, count, and steward significant gifts.

The GCF Difference

Participating in the GCF CAP study group, participants learn within a small cohort of professional advisors who advise clients around wealth from various disciplines. Each year, the CAP cohort includes a mix of participants that include attorneys, wealth managers, accountants, financial planners, trust officers, and non-profit professionals.

Participants attend bi-weekly study group meetings, where finer details of assignments are explored, and participants share relevant real-life case studies. In addition, the group is invited to participate exclusive behind the scenes opportunities in the non-profit community, and to learn from guest presenters which include local philanthropists, subject matter experts and other special guests who enrich the curriculum.

FACILITATOR BIOGRAPHIES

Terence "Terry" L Horan, CLU, ChFC, CAP®
President and CEO of HORAN
GCF CAP® Facilitator

Seasoned by 40 years of experience in financial services, Terry represents his clients with credentials that include being a Chartered Life Underwriter, a Chartered Financial Consultant and an Accredited Estate Planner. Terry's extensive professional network includes legal, accounting, trust and banking representatives committed to implementing the most efficient and sensible programs for clients. Terry earned his CAP in 2019 and actively employs strategies from the program in his work with clients.

Michele Carey, CAP®
Director of Professional Advisor Relations, Greater Cincinnati Foundation
GCF CAP® Facilitator

In her role at GCF, Michele works with professional advisors and their clients to connect them with charitable resources. Michele maintains an in-depth knowledge of the tools used in charitable giving and connections to local non-profits; and skillfully weaves relevant anecdotes and real-life case studies into conversations about advanced philanthropic and charitable giving strategies. Achieving her CAP® designation in 2013, Michele employs strategies she learned from CAP to help generous people in our region create their family's legacy.

For more information, contact:
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