

## *Chartered Advisor in Philanthropy (CAP®) Program*

### Program Information

#### Overview

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

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 over 14 class sessions. More than 1,900 individuals have been awarded the CAP® designation since its inception in 2003. More information can be found at <https://www.theamericancollege.edu/designations-degrees/CAP>.

#### Cost

For-profit professional advisors: \$4,295 (includes all three courses)  
Nonprofit professionals: \$3,395 (includes all three courses)

#### Course Descriptions

CAP® is made up of three separate, graduate-level courses that span roughly eight months. Each course has a mandatory exam that you must score at 70% or higher to move on to the next course.

##### **GS 839 Planning for Impact in the Context of Family Wealth**

The focus of this course is on wealth in families and wealthy families in community with others. By the end of this course, the fundraiser and advisor should have the knowledge needed to elicit client or donor goals for self, family and society and to convene a team to achieve those goals now, later, at death or beyond death, through a financial plan, business exit plan, estate plan, or gift plan.

##### **GS 849 Charitable Giving Strategies**

The focus of this course is on charitable tax strategies, tools, and techniques. By the end of this course, students will have the knowledge needed to open a client-specific or donor-specific conversation about the features and benefits of appropriate charitable tools. The student will then be able to convene a planning team, or in simpler cases, close for the gift.



### **GS 859 Gift Planning in a Nonprofit Context**

The focus of this course is on gift planning for nonprofits. By the end of this course, students should have the knowledge needed to apply the concepts and processes introduced in GS 839 and GS 849 to develop six to eight figure gifts for a specific nonprofit from its highest capacity donors.

### **The GCF Difference**

Participants in the GCF CAP study group have the advantage of learning within a small cohort of professional advisors who advise clients around wealth from various disciplines. Each year, the cohort consists of a mix of participants that includes attorneys, wealth managers, accountants, financial planners, trust officers, and non-profit professionals who practice throughout the region.

Bi-weekly meetings for participants in the cohort explore the finer details of assignments, and participants share relevant real-life case studies. To enrich the curriculum, the GCF CAP study group is invited to participate in exclusive, behind-the-scenes opportunities in the non-profit community, as well as learn from guest presenters which include local philanthropists, subject matter experts, and other special guests.

### **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, please contact:**

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