Chartered Advisor in Philanthropy (CAP®) Study Group
Program Information

Overview
The Chartered Advisor in Philanthropy (CAP®) 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 estate planning and wealth management goals. Convening participants in the professions of law, accounting, financial services, and planned giving, the program promotes an interdisciplinary approach.

Over 1,900 individuals have been awarded the CAP® designation since its inception in 2003. More information can be found at https://www.theamericancollege.edu/learn/professional-designations-certifications/cap-chartered-advisor-in-philanthropy.

Cost
Tuition for the he Chartered Advisor in Philanthropy designation is payable to the American College of Financial services. The GCF CAP® Study Group is a complementary program provided by Greater Cincinnati Foundation to support individuals earning the CAP® designation. Please visit The American College of Financial Services website to view the most current tuition costs for the CAP® designation.

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 themselves, their families, and society, as well as to convene a team to achieve those goals—now, later, at death, or beyond—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 initiate client- or donor-specific conversations about the features and benefits of appropriate charitable tools. Students 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 benefit of learning within a small cohort of professional advisors who advise clients around wealth from various disciplines. Each year, the cohort comprises a diverse group of participants, including attorneys, wealth managers, accountants, financial planners, trust officers, and non-profit professionals who practice throughout the region.

Bi-weekly cohort meetings delve into the intricacies of assignments, with participants sharing relevant case studies from personal experience. To enrich the curriculum, the GCF CAP® study group is offered exclusive, behind-the-scenes opportunities in the non-profit community and the chance to learn from guest presenters, including local philanthropists, subject matter experts, and other special guests.

Facilitator Biographies

Terence "Terry" L. Horan, CLU, ChFC, CAP®
President and CEO, 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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