



AGREEMENT FOR TRANSFER OF CREDITS FROM THE AMERICAN COLLEGE TO LILLY FAMILY SCHOOL OF PHILANTHROPY, INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS

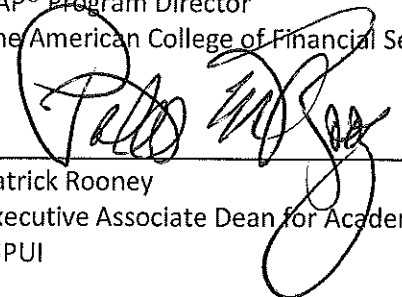
The American College of Financial Services and Indiana University-Purdue University Indianapolis (IUPUI) agree to maintain guidelines outlining specific course transfers for students in IUPUI's Lilly Family School of Philanthropy who desire to transfer course credits from The American College's Chartered Advisor in Philanthropy® (CAP®) program to IUPUI's Master of Arts in Philanthropic Studies program. Both The American College and IUPUI will make transfer information as outlined in these guidelines available to all interested students.

IUPUI's Lilly Family School of Philanthropy will accept transfer credits from students of The American College as described below. Satisfactory course completion must be documented on an official transcript from The American College. Acceptable grades include letter grades of "B" or better.

The Lilly School agrees to allow the following courses to transfer from The American College for credit for the IUPUI courses listed below:

THE AMERICAN COLLEGE	IUPUI LILLY SCHOOL OF PHILANTHROPY
GS 839 - Planning for Philanthropic Impact in the Context of Family Wealth	PHST-P5XX Elective course in the Master of Arts in Philanthropic Studies program
GS 849 - Charitable Giving Strategies	
GS 859 - Gift Planning in a Nonprofit Context	
GS 869 - Legacy Planning Reimagined	

X  Date 6/9/2022
 Jennifer Lehman
 CAP® Program Director
 The American College of Financial Services

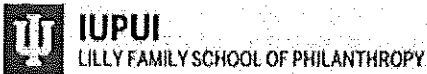
X  Date 6/30/2022
 Patrick Rooney
 Executive Associate Dean for Academic Programs
 IUPUI


Lutz, Susan C

From: Rooney, Patrick M.
Sent: Thursday, June 9, 2022 3:36 PM
To: Lutz, Susan C
Subject: FW: re: transfer agreement with The American College
Attachments: CAP Draft Transfer Agreement between TAC and IUPUI wJL.docx

ppa

Patrick M. Rooney, PhD
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Professor of Economics and Philanthropic Studies
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From: Lehman, Jennifer <Jennifer.Lehman@theamericancollege.edu>
Sent: Thursday, June 9, 2022 3:32 PM
To: Rooney, Patrick M. <rooney@iupui.edu>
Subject: [External] re: transfer agreement with The American College

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Patrick,

Good afternoon! I understand you've worked with Phil Cubeta in the past. I'm happy to say he is still with the College (and has been a huge resource for me), though in a different role, and I'm the new CAP® Program Director.

We have a draft transfer agreement letter (attached), to essentially make official what has already been happening, if I'm understanding correctly. If you're in agreement and you're the right person to sign this letter, please sign and send back to me so we each have a copy for our records. If you're not the right person, please point me in the right direction. If you'd like to discuss it further, I'm happy to do so via email, phone or Teams/Zoom.

In addition, I would like to develop a relationship with you and/or other leaders at the Lilly School. As the premier program, you have our respect and admiration, and we want to continue working with you. If I can be of help in any way, please let me know.

Respectfully,

Jennifer Lehman, Ph.D., J.D., CFP®
Program Director, Chartered Advisor in Philanthropy®

**Wallace Chair of Learning and Professionalism in Philanthropy and Assistant Professor of
Philanthropy | Academics**

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Since 1927, The American College of Financial Services has helped financial services professionals realize their career goals through rigorous and practical education.