



THE  
AMERICAN  
COLLEGE  
OF FINANCIAL SERVICES®

# CAP®

## Chartered Advisor in Philanthropy®

Delivering clients' highest aspirations

[TheAmericanCollege.edu/CAP](https://TheAmericanCollege.edu/CAP)



# Why Become a CAP<sup>®</sup>

The CAP<sup>®</sup> designation empowers you with specialized expertise to help clients identify philanthropic intent and maximize their legacy for lasting impact

Becoming a CAP<sup>®</sup> professional gives you:

- ✔ Unique knowledge that spans the art and science of philanthropy
- ✔ Tools to enable you to collaborate across the table effectively
- ✔ Confidence to help clients identify and achieve their highest aspirations
- ✔ Skills to move beyond traditional estate planning and deliver greater value
- ✔ Support of a professional network in both wealth advisory and nonprofit sectors

*“The CAP<sup>®</sup> program has added to my repertoire as an attorney, but more importantly, as a trusted advisor to individual, corporate, and nonprofit clients.”*

Philip M. DiComo, Esq, CAP<sup>®</sup>

88%

of advisors agree that philanthropic conversations are important to have with clients.<sup>1</sup>

<sup>1</sup>U.S. Trust. The U.S. Trust<sup>®</sup> Study of the Philanthropic Conversation. 2015.



# Your Differentiator: Specialized Education from The College

The College's CAP® Program is unique in its structure and specificity, combining self-study e-learning delivery that connects philanthropic advisors across the nation with a curriculum meant for professionals on both sides of donors' charitable giving plans.

The program features:



Cross-disciplinary curriculum spanning all aspects of philanthropic planning



Thriving and collaborative community of advisors and gift planners



Modern e-learning experience accessible whenever and wherever you are



Elite faculty of nationally-recognized academics and researchers



Unique synthesis of philanthropic knowledge not available anywhere else



Free consumer education program for designees to promote expertise

Charitable giving in  
America reached a record

**\$471**

billion in  
2020.<sup>2</sup>

<sup>2</sup> Fidelity Charitable. On the Leading Edge: Accelerating firm growth with charitable planning. 2021.

# CAP<sup>®</sup> Program at a Glance

The College's CAP<sup>®</sup> Program is ideal for experienced professionals who want to deepen their clients' philanthropic goals, integrate charitable planning into overall estate plans, and help build lasting legacies.

| <b>Tuition</b> | <b>Timing</b>                 | <b>Format</b>           |
|----------------|-------------------------------|-------------------------|
| \$4,495        | Complete in 12 months or less | 100% online, self-study |

### **Your Learning Outcomes**

- Summarize the features and benefits of popular charitable giving tools
- Analyze the tax and financial implications of assets used to fund the tools
- Recommend charitable planning tools in light of a donor or client's overall legacy plan for self, family, and society
- Develop a charitable planning proposal for a donor or client in light of their overall legacy plan for self, family, and society

### **Supporting Greater Professional Diversity**

The CAP<sup>®</sup> Program's Advisors of Color cohorts connect African American philanthropic leaders from across the nation. Now in its fifth cohort, these students represent for-profit and nonprofit organizations, as well as alumni from Historically Black Colleges and Universities.

The College is dedicated to growing racial, ethnic, and gender diversity in philanthropic planning. The African American Advisor Scholarship Program seeks to deliver educational support in the form of scholarships and career opportunities. Visit [TheAmericanCollege.edu/African-American-Scholarship-Program](https://TheAmericanCollege.edu/African-American-Scholarship-Program) to learn more and apply.

# Your Educational Journey Starts Here

There are no prerequisite courses required before you can begin our program. However, three years of full-time, relevant business experience are required to use the designation.

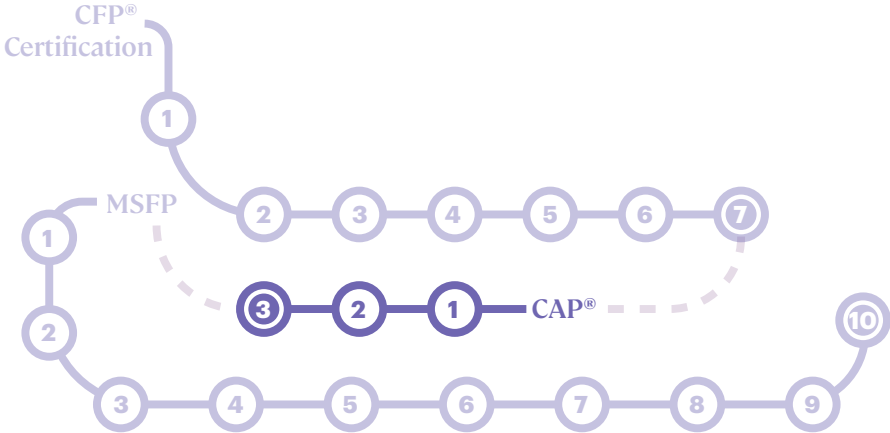
To receive and maintain the CAP® designation you must:

- Successfully complete the three required courses
- Agree to comply with The American College Code of Ethics and Procedures
- Participate in the annual Professional Recertification Program (PRP)

## Your Roadmap to Success

Your learning journey doesn't have to begin or end with earning your CAP® designation. Our three-course CAP® Program can fit into any life-long learning journey with The American College of Financial Services.

Here are a few potential paths:



If you've become a CERTIFIED FINANCIAL PLANNER™ through The College's CFP® Certification Education Program, successfully complete (3) more courses to connect your financial planning acume to a specialization in philanthropic planning. CAP® designees can then successfully complete a Master of Science in Financial Planning (MSFP) with a concentration in legacy planning.

# Expand Your Opportunities

The American College of Financial Services delivers applied financial knowledge and education, promotes lifelong learning, and advocates for ethical standards for the benefit of society.

As a lifelong learning partner, you will benefit from:

- Extensive professional network of one-in-five financial advisors educated by The College
- Ready-to-use knowledge delivered by plugged-in, industry-leading experts
- Interactive community engagement featuring frequent webinars, conferences, and professional development events
- Advanced planning skills and real-world application not delivered elsewhere
- Modern education through the latest in mobile-friendly, e-learning technology
- Prestigious pedigree and client recognition from nearly 100 years of academic excellence

## CAP<sup>®</sup>

### Chartered Advisor in Philanthropy<sup>®</sup>

**[TheAmericanCollege.edu/CAP](http://TheAmericanCollege.edu/CAP)**

**866-640-2210**

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The mark of CAP<sup>®</sup> is the property of The American College of Financial Services and may be used by individuals who have successfully completed the initial and ongoing certification requirements for this designation. The College can disallow use of the CAP<sup>®</sup> if advisors do not adhere to the program's ethical standards, continuing education, and other requirements.



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