THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

CAP®

CHARTERED ADVISOR IN PHILANTHROPY®

Delivering clients' highest aspirations

Why Become a CAP®

- ✓ **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 non-profit sectors

78%

of financial advisors agree that philanthropic conversations are important to have with clients.[1]

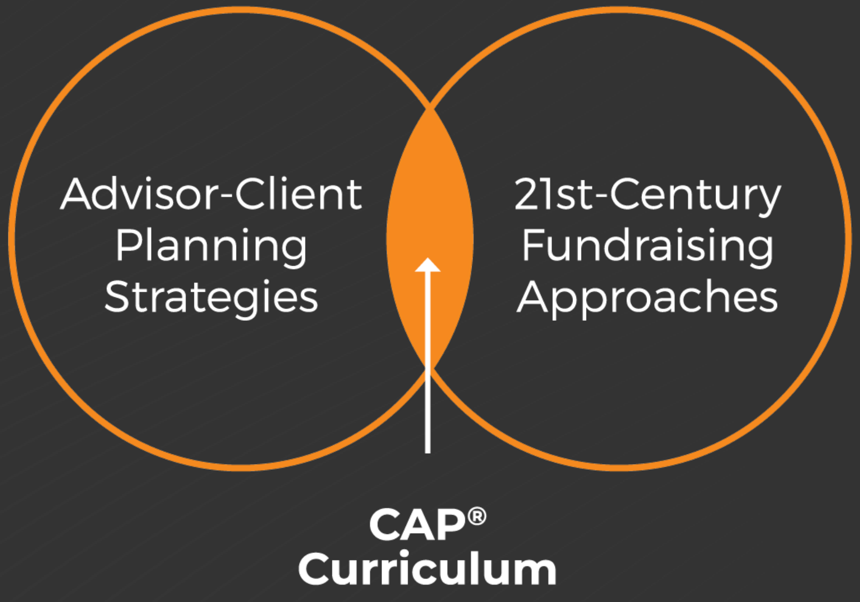
[1] U.S. Trust. The U.S. Trust® Study of the Philanthropic Conversation. 2019.

An Unmatched Breadth of Knowledge

Effective philanthropic planning demands knowledge that spans both the wealth advisory and non-profit perspectives.

The CAP® Program meets this need by providing:

- A cross-disciplinary curriculum covering everything from taxation and fundraising to family dynamics and strategic philanthropy
- A dynamic and evolving body of synthesized, specialized knowledge
- Bonus: 10 CFP® CE hours per course



Supporting Your Practice with *Powerful Client Education*

A Spectrum of Legacies is a unique e-learning education program available to **CAP® designees** to empower and inform their clients and demonstrate the extraordinary value of their legacy planning services.

- Activities to uncover answers to formidable legacy planning questions
- Fillable worksheets for defining estate planning goals
- Checklists to better navigate the legacy planning process
- Self-assessments to ensure values align with planning
- Case studies to fuel discussions around legacy planning design

Your Education Differentiator

- **Cross-disciplinary curriculum** spanning all aspects of philanthropy
- **Thriving and collaborative community** of CAP® professionals, from experienced philanthropic advisors and gift planners to fundraisers and more
- **Elite faculty** of nationally-recognized academics and researchers
- **Modern e-learning** available whenever and wherever you are
- **A unique synthesis** of philanthropic knowledge not available anywhere else
- **Free consumer education** program for designees to promote expertise

Program at a Glance

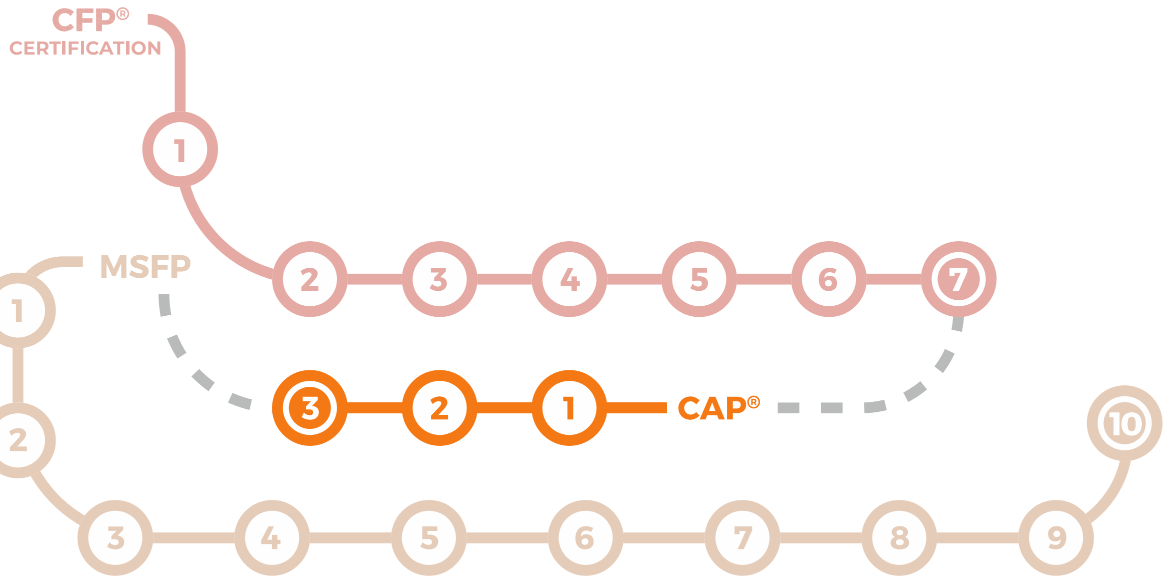
- **Tuition:** $4,295 (special non-profit pricing available)
- **Timing:** Complete in 12 months or less
- **Format:** 100% online, self-study

Learning Outcomes:

- Applying the best tax strategies, tools, and techniques for charitable giving
- Understanding client or donor goals for self, family, and/or society
- Advising wealthy families on important financial matters, including business exit planning, estate planning, and legacy planning
- Handling gift-planning for nonprofits and high-capacity donors

CAP® Roadmap to Success

The CAP® Program can fit into any lifelong learning journey with
The American College of Financial Services.



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 acumen 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.

CAP® Education Prerequisites

Prerequisite courses are not required before you can begin the CAP® program.

To receive and maintain the CAP® designation you must:

- Have three years of full-time, relevant business experience
- Successfully complete the three required courses
- Agree to comply with The American College Code of Ethics and Procedures

Participation in the annual Professional Recertification Program (PRP) is required to maintain the designation.

Your Best Investment

By choosing **The American College of Financial Services** as your lifelong learning partner, you'll benefit from:

- Extensive professional network of financial professionals and leaders
- Ready-to-use knowledge delivered by industry-leading experts
- Interactive community with frequent 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 of nearly 100 years of academic excellence

Thank You!

To learn more, visit **TheAmericanCollege.edu/CAP**

or call **866-640-2210**