CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

The Chartered Advisor in Philanthropy (CAP®) program is a year-long series of courses that teach professional advisors how to best help clients discover the legacies they will leave their families and community. The program 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. By integrating the professions of law, accounting, financial services and planned giving, OCF promotes an inter-disciplinary approach to most effectively achieve their client's goals.

The CAP® program involves passing three graduate level courses and meeting in 15 class sessions. The American College, in Bryn Mawr, PA, is the nation's leading educator of professionals in the insurance and financial services industry providing remote learning throughout the country. Over 700 individuals have been awarded the CAP® designation since its inception in 2003.

The program is organized by the Omaha Community Foundation (OCF) and led by OCF board member, Mark Weber a principal of Silverstone Group.

COST

For-profit professional advisors: $3,800 ($1,350 per course)

Nonprofit professionals: $3,070 ($1,120 per course)

There are limited scholarship opportunities available based on need.

COURSE DESCRIPTIONS

CAP is made up of three separate courses that span roughly eight months with a one month break between the three. Each course has a mandatory exam that you must score at 70% or higher to move on to the next course. Here are the course definitions:

GS839: Planning for Philanthropic Impact in the Context of Family Wealth. In this course you learn how clients and donors can use financial planning, estate planning, and gift planning to advance their personal financial goals for self and family, while also having a positive impact on their community.

GS849: Charitable Strategies. In this course you learn how to explain and place the most common charitable strategies-both one by one and within and overall plan-to achieve donor goals for self, family, and community.

GS859: Gift Planning in a Nonprofit Context. This course focuses on what nonprofits call "planned giving." The course is designed to help board leaders, advisors and nonprofits collaborate to create, count, and steward significant gifts.

Omaha Community Foundation

Let good grow.

GUEST SPEAKER TOPICS

FAMILY GIVING

- A CEO of a large 3rd generation family-owned business shared the inner workings of the foundation established by his grandparents to teach good citizenship and leadership skills to their grandchildren.
- After a 4th generation business went public and was "monetized", the CEO shared how he used a portion of the proceeds to continue his family's generational philanthropy while including his children in the process.
- A successful entrepreneur shared his contrarian view of money, children and philanthropy and how he has made it work for his family.

PRIVATE FOUNDATION

- A CEO of a private foundation described how a billionaire transitioned from "traditional" philanthropy to "entrepreneurial" philanthropy and is making a profound difference on his terms.
- The executive directors of three large private foundations/support organizations talked about the challenges of giving money away effectively while staying true to their mission.

NONPROFIT LEADERSHIP

- A long-time executive director of a local foundation provided insights to the administration of nonprofits and the responsibilities of nonprofit boards.
- A CEO of a nonprofit shared how government cut backs in funding have caused his organization to establish a Planned Giving function to make up the shortfall and the challenges of the transition.
- A veteran development officer provided insights into the nurturing of multi-million dollar planned gifts and how he helped the donor and the institution meet their needs.

PROFESSIONAL EXPERTISE

- Tax consultants revealed how to get maximum tax benefits by structuring significant gifts in accordance with the intricate requirements of the tax code.
- An attorney with multiple years experience representing nonprofits, discussed how to draft effective Gift Acceptance policies to clearly spell out the intentions of both donor and nonprofit to avoid any future misunderstandings.

FROM CAP® PARTICIPANTS

"I have found that most people are charitable and would be more so if they know how to effectively support nonprofit organizations without jeopardizing their own security. CAP® has given us the skills to help people explore these ideas and find solutions that cement their own legacies through greater support of the organizations dear to their heart."

---Jason Hiley of Hiley Wealth Management

"The interaction of the group and sharing of different perspectives gave me a different perspective on the whole topic. Learning about the Non Profit sector and that thought process was terrific and opened my eyes."

---Larry D. Tennison of Seim Johnson LLP