

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, the Omaha Community Foundation 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 King of Prussia, PA, is the nation's leading educator of professionals in the insurance and financial services industry providing remote learning throughout the country. Over 2,000 individuals have been awarded the CAP® designation since its inception in 2003.

The Omaha CAP Study Group Program was founded and led by Mark A. Weber and is administered by the Omaha Community Foundation.

COST

For-profit professional advisors: \$3,800 (includes all three courses)

Nonprofit professionals: \$3,000 (includes all three courses)

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 Giving Strategies. In this course you learn how to explain and place the most common charitable strategies-both one by one and within an 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

Good grows here.

CONTINUING EDUCATION

Continuing education credits are available for successful completion of the Chartered Advisor in Philanthropy designation. Attendance is taken at every class and all three exams are completed at a nationally recognized professional testing center. For further information on CE credits, please contact Kelli Cavey or Steven Jerina at the Omaha Community Foundation.

FACILITATOR BIOGRAPHIES

MARK WEBER, JD, MSFS, CLU, CHFC, CAP®

Legacy Spectrum Advisor LLC

Mark A. Weber is the President of Legacy Spectrum Advisor LLC. After a distinguished career as a financial advisor, Mark is now an author, public speaker and consultant to families. Mark introduced the idea of the CAP Study Group Program to Omaha in 2012 and is the primary facilitator of the Chartered Advisor in Philanthropy classes.

KELLI CAVEY, JD, CAP®

Director of Donor Services, Omaha Community Foundation

Kelli Cavey is a Donor Services Specialist at the Omaha Community Foundation where she focuses on the Foundation's impact investing program. Kelli also works closely with Foundation donors and their advisors to facilitate efficient and impactful charitable giving. Prior to joining the Foundation, Kelli practiced law as an estate planning attorney for over ten years. Kelli currently assists in the facilitation of the Omaha CAP® program.

STEVEN JERINA, CAP®

Donor Services Specialist, Omaha Community Foundation

Steve Jerina is a Donor Services Specialist at the Omaha Community Foundation, which connects people who care about the community with nonprofits that are doing the most good. The Foundation enables donors to accomplish more with their gifts by simplifying the philanthropic process. Steve also works closely with donors to implement legacy giving and collective giving strategies. Prior to joining the Foundation, Steve was a fundraiser in higher education. Steve currently assists in the facilitation of the Omaha CAP® program.