CHARTERED ADVISOR IN PHILANTHROPY (CAP®)

Grow your philanthropic expertise with graduate-level learning.

Omaha Community Foundation

Growing good, together.

OVERVIEW

The Chartered Advisor in Philanthropy (CAP®) program is a year-long program offered to professional advisors. It provides participants with the knowledge, resources, and tools necessary to help clients reach their philanthropic giving objectives, while also helping them meet their estate planning and wealth management goals. During the program, local philanthropists and nonprofit leaders share their real-world experiences and knowledge as guest speakers.

The CAP® curriculum is sponsored by the American College of Financial Services. It is complimented by our Omaha CAP® study group which combines the online courses with in-person conversations. The study group is led by Mark A. Weber, Legacy Spectrum Advisor LLC, and the Omaha Community Foundation, and was founded in 2012.

The goal of the program is simple: make Omaha a more generous community. This program brings together some of Omaha's top professional advisors in accounting, legal, and financial services with nonprofit development professionals to learn collaboratively about philanthropy while they pursue their CAP® designation.

"The CAP® course has been the most rewarding accomplishment of my professional career. All the time and effort I put into it was worth it and I will never forget the entire CAP® experience. I am anxious to take this information and help others to make their legacy a reality."

a CAP® graduate

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

The CAP® curriculum 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 and your score must be 70% or higher in order to move to the next one. The study group meets for two hours every other week from May to December with a break between each course. Students must commit to attending a minimum of 60% of the classes.

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.

INDICATION OF INTEREST

If you are interested in being considered for the Omaha CAP® program, please complete the attached Indication of Interest form and send it via mail or e-mail to Kelli Cavey as follows:

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