GULF COAST
COMMUNITY
FOUNDATION

Chartered Advisor in Philanthropy (CAP®) 2025 Study Group Program

Program Information Overview

The Chartered Advisor in Philanthropy (CAP®) Study Group Program at Gulf Coast Community Foundation (Gulf Coast) is a three-course series that prepares professional advisors to best help clients discover the legacies they will leave to their families and community. By completing three graduate-level CAP® courses and subsequent passing exams, participants will earn the Chartered Advisor in Philanthropy (CAP®) designation from the American College of Financial Services.

CAP® 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. Convening participants in the professions of law, accounting, financial services, and planned giving, the program promotes an inter-disciplinary approach to most effectively achieve a client's goals.

Achieving the designation of Chartered Advisor in Philanthropy (CAP®) includes passing three graduate level courses and meeting over 14 class sessions. More than 1,900 individuals have been awarded the CAP® designation since its inception in 2003.

More information can be found here.

The Gulf Coast Advantage

Participants in the Gulf Coast CAP® study group have the advantage of learning within a small cohort of professional advisors who advise clients around wealth from various disciplines. Each year, the cohort consists of a mix of participants that includes attorneys, wealth managers, accountants, financial planners, trust officers, and non-profit professionals who practice throughout the region.

Bi-weekly meetings for participants in the cohort explore the finer details of assignments, and participants share relevant real-life case studies. To enrich the curriculum, the Gulf Coast CAP® study group is invited to participate in exclusive, behind-the-scenes opportunities in the nonprofit community, as well as learn from guest presenters which include local philanthropists, subject matter experts, and other special guests.

GULF COAST
COMMUNITY
FOUNDATION

Course Descriptions

CAP® is made up of three separate, graduate-level courses that span roughly eight months. Each course has a mandatory exam that you must score at 70% or higher to move on to the next course.

CAP 539 Planning for Impact in Context of Family Wealth

The focus of this course is on 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. By the end of this course, you'll be able top position yourself at the table where the client or donor's big dollars are planned, emerge as the client or donor's trusted advisor, integrating charitable planning with the donor or client's overall estate and business planning, and help donors and clients achieve positive impact for self, heirs, and community.

CAP 549 Charitable Giving Strategies

The focus of this course is on charitable tax strategies, tools, and techniques. By the end of this course, you'll be able to explain the features and benefits of each individual charitable tool, compare and contrast the tools in light of a donor or client's overall legacy plan for self, family, and society, and identify reasons advisors and fundraisers often collide, and the ways they may work more effectively together.

CAP 559 Gift Planning in a Nonprofit Context

The focus of this course is on how to collaborate to create, count, and steward significant gifts from the advisor, board leader, and nonprofit point of view. By the end of this course, you'll be able to identify the roles of the three sectors, discuss how fundraising is structured and managed, understand what high capacity donors want, and recognize how "personalized" or "donor-focused planning" complements the value-based planning that is taught in the other CAP® courses.

Cost

For-profit Professional Advisors	Nonprofit Professionals
$4,495 (includes all three courses)	$3,695 (includes all three courses)

GULF COAST
COMMUNITY
FOUNDATION

Your Facilitator

Joe Carter, CAP®
Vice President of Philanthropy | Gulf Coast Community Foundation

Joe has over 30 years of experience in higher education and nonprofit fundraising for organizations in the areas of major gifts and planned giving. Joe joined Gulf Coast Community Foundation as the Vice President of Philanthropy in June 2024 after working with the Oklahoma City Community Foundation for twenty plus years, the last sixteen spent in the role of assisting professional advisors, donors, and organizations with developing strategic plans around planned giving.

He is a current Board member of the Charitable Gift Planners of Southwest Florida, member of the Venice Estate Planning Council, and past president of the Oklahoma Association of Charitable Gift Planners. He is a graduate of the American College's Chartered Advisor in Philanthropy (CAP®) program and currently serves as the moderator for the Gulf Coast CAP® Study Group Cohort. Prior to Gulf Coast and OCCF, he held positions as the Chief Development Officer for Children's Hospital Foundation, and various roles at higher education institutions.

For more information, please contact:

Elizabeth Welch, J.D.
941.486.4619
ewelch@gulfcoastcf.org