

Chartered Advisor in Philanthropy (CAP®) 2024 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 of the 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 interdisciplinary 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 at: <https://www.theamericancollege.edu/designations-degrees/CAP>

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. The cohort will consist of a mix of participants including attorneys, wealth managers, accountants, financial planners, trust officers, and nonprofit 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.

Course Descriptions

CAP® is made up of three separate, graduate-level courses that span roughly 10 months. Each course has a mandatory exam that you must score at 70% or higher to move on to the next course.

GS 839 Planning for Impact in the Context of Family Wealth

The focus of this course is on wealth in families and wealthy families in community with others. By the end of this course, students should have the knowledge needed to elicit client or donor goals for self, family and society and to convene a team to achieve those goals now, later, at death or beyond death, through a financial plan, business exit plan, estate plan, or gift plan.

GS 849 Charitable Giving Strategies

The focus of this course is on charitable tax strategies, tools, and techniques. By the end of this course, students will have the knowledge needed to open a client-specific or donor-specific conversation about the features and benefits of appropriate charitable tools. The student will then be able to convene a planning team, or in simpler cases, close for the gift.

GS 859 Gift Planning in a Nonprofit Context

The focus of this course is on gift planning for nonprofits. By the end of this course, students should have the knowledge needed to apply the concepts and processes introduced in GS 839 and GS 849 to develop six to eight figure gifts for a specific nonprofit from its highest capacity donors.

Cost

For-profit professional advisors	Nonprofit professionals
\$4295 (includes all three courses)	\$3395 (includes all three courses)

Facilitator Biographies

Phillip P. Lanham, CAP®

President and CEO of Gulf Coast Community Foundation

Gulf Coast CAP® Facilitator

Phillip P. Lanham, CAP® is the President | CEO of Gulf Coast Community Foundation, responsible for the leadership of Gulf Coast, including corporate strategy and programs, operations, and investments. As a Chartered Advisor in Philanthropy®, Phillip is a seasoned executive in the philanthropic arena.

Phillip has built a reputation as an accomplished executive leader with a strong background in creating results-driven strategies. He has a 20-plus year career dedicated to philanthropy. Most recently, Phillip served as chief philanthropy officer at Greater Cincinnati Foundation where he successfully led the philanthropic partnerships team in providing strategic guidance for relationships with donors, nonprofits, businesses, and private foundations.

CJ Bannister

Philanthropic Advisor, Gulf Coast Community Foundation

Gulf Coast CAP® Facilitator

In her role at Gulf Coast Community Foundation, CJ works with professional advisors and their clients to connect them with charitable resources. CJ maintains an in-depth knowledge of the tools used in charitable giving, connections to local nonprofits, and skillfully weaves relevant anecdotes and real-life case studies into conversations about advanced philanthropic and charitable giving strategies.

For more information, please contact:

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