

Chartered Advisor in Philanthropy (CAP®) Gulf Coast Community Foundation Study Group

2024 Class Schedule

Course 1: GS839 Planning for Impact in the Context of Family Wealth

| Date | Topic | |
|-----------------------------|---|---------------|
| Jan 16 | Your seat at the planning table | Assignment 1 |
| In Person - Venice | The spirit of our work | Assignment 2 |
| | Wealth in families | Assignment 3 |
| | Family philanthropy | Assignment 4 |
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| Feb 20 | Your philanthropic roadmap | Assignment 5 |
| Virtual | Styles of philanthropic grant-making | Assignment 6 |
| | Identity and the adult life cycle in legacy planning | Assignment 7 |
| | Three generations of philanthropist | Assignment 8 |
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| Mar 19 | Case of the forest primeval | Assignment 9 |
| In Person - Sarasota | Your position and your practice | Assignment 10 |
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| March 26 | Cross cutting summary and exam preparation (optional) | Assignment 11 |
| Virtual Exam Prep | **Bonus Assignment** The Melton Case | |
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| Apr 2 | CAPpy Hour | |
| | Take test for GS 839 by this due date | |

Course 2: GS 849: Charitable Giving Strategies

| Date | Topic | |
|----------------|---|--------------|
| April 16 | The case of Jill Donor | Assignment 1 |
| Virtual | The tax framework for charitable giving | Assignment 2 |
| | Charitable remainder trusts, gift annuities, and single premium annuities | Assignment 3 |
| | Charitable lead trusts | Assignment 4 |

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|---------------------------|---|---------------|
| May 21 | Private foundations | Assignment 5 |
| In Person - Venice | Donor advised funds and organizations providing them | Assignment 6 |
| | Life insurance, annuities, qualified plan interests, and bequests | Assignment 7 |
| | Other charitable tools and techniques | Assignment 8 |
| June 18 | Planning for gifts of noncash assets | Assignment 9 |
| Virtual | Three generations of Hurleys | Assignment 10 |
| June 25 | Course Recap and exam preparation (optional) | Assignment 11 |
| Virtual Exam Prep | | |
| Jul 2 | CAPpy Hour | |
| | Take test for GS 849 by this date | |

Course 3: GS 859: Gift Planning in a Nonprofit Context

| Date | Topic | |
|-----------------------------|--|---------------|
| Jul 16 | America's Nonprofit Sector | Assignment 1 |
| Virtual | Ten basic responsibilities of nonprofit boards | Assignment 2 |
| | Fundraising responsibilities of nonprofit boards | Assignment 3 |
| | Cultivation and soliciting major, planned, and blended gifts | Assignment 4 |
| | From stewardship to accountability | Assignment 5 |
| Aug 20 | Philanthropic planning in the new social economy | Assignment 6 |
| In Person - Sarasota | Gift planning for highest capacity donors | Assignment 7 |
| | Personalized philanthropy: crash the fundraising matrix | Assignment 8 |
| | Ethics and ideals of gift planning as profession | Assignment 9 |
| Aug 27 | Course recap and exam preparation (optional) | Assignment 10 |
| Virtual Exam Prep | | |
| Sept 3 | CAPpy Hour | |
| | Take test for GS 859 by this date | |
| Sept 17 | GRADUATION at Sarasota Philanthropy Center | |

All meetings will be held at Gulf Coast Community Foundation's Venice Headquarters or Sarasota Philanthropy Center from 4:00 p.m. – 5:30 p.m. We will also make it available on-line via Zoom.

The location will be determined the week prior to each study session.

Venice Headquarters
601 Tamiami Trail S
Venice, FL 34285

Sarasota Philanthropy Center
1549 State Street
Sarasota, FL 34236

Signing Up for Each Test

Tests can be scheduled at <http://home.pearsonvue.com/Home.aspx>

You are encouraged to register for each of the three final exams at least one week before you wish to take the test. A 4-week gap between courses is scheduled for you to take the exam.

All exams will be scheduled online and taken at a testing center.

- March – Register for GS 839 test to be taken in April
- June – Register for GS 849 test to be taken in July
- August – Register for GS 859 test to be taken in September

Facilitator Biographies

Phillip P. Lanham, CAP®

President and CEO of Gulf Coast Community Foundation

Gulf Coast CAP® Facilitator

Phillip P. Lanham, CAP® is responsible for the leadership of Gulf Coast Community Foundation, 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 and connections to local non-profits; and skillfully weaves relevant anecdotes and real-life case studies into conversations about advanced philanthropic and charitable giving strategies.

**For more information, please contact CJ Bannister at 941.545.4762 or
CJBannister@gulfcoastcf.org**