

Chartered Advisor in Philanthropy (CAP®) Group 2023 Class Schedule

Course 1

GS 839: Planning for Impact in the Context of Family Wealth

Date	Topic	
May 3	Your seat at the planning table	Assignment 1
	The spirit of our work	Assignment 2
May 17	Wealth in families	Assignment 3
	Family philanthropy	Assignment 4
May 31	Your philanthropic roadmap	Assignment 5
	Styles of philanthropic grant-making	Assignment 6
June 14	Identity and the adult life cycle in legacy planning	Assignment 7
	Three generations of philanthropist	Assignment 8
June 28	Case of the forest primeval	Assignment 9
	Your position and your practice	Assignment 10
July 12	Cross cutting summary and exam preparation (optional)	Assignment 11
	Bonus Assignment The Melton Case	
July 26	Take test for GS 839 by this due date	

Course 2

GS 849: Charitable Giving Strategies

Date	Topic	
August 2	The case of Jill Donor	Assignment 1
	The tax framework for charitable giving	Assignment 2
August 16	Charitable remainder trusts, gift annuities, and single premium annuities	Assignment 3
	Charitable lead trusts	Assignment 4
August 30	Private foundations	Assignment 5

	Donor advised funds and organizations providing them	Assignment 6
September 13	Life insurance, annuities, qualified plan interests, and bequests	Assignment 7
	Other charitable tools and techniques	Assignment 8
September 27	Planning for gifts of noncash assets	Assignment 9
	Three generations of Hurleys	Assignment 10
October 11	Course Recap and exam preparation (optional)	Assignment 11
October 18	Take test for GS 849 by this date	

Course 3

GS 859: Gift Planning in a Nonprofit Context

Date	Topic	
October 25	America's Nonprofit Sector	Assignment 1
	Ten basic responsibilities of nonprofit boards	Assignment 2
November 8	Fundraising responsibilities of nonprofit boards	Assignment 3
	Cultivation and soliciting major, planned, and blended gifts	Assignment 4
	From stewardship to accountability	Assignment 5
November 21	Philanthropic planning in the new social economy	Assignment 6
Tuesday	Gift planning for highest capacity donors	Assignment 7
December 6	Personalized philanthropy: crash the fundraising matrix	Assignment 8
	Ethics and ideals of gift planning as profession	Assignment 9
December 20	Course recap and exam preparation (optional)	Assignment 10
December 29	Take test for GS 859 by this date	

All meetings held at Greater Cincinnati Foundation from 3:30 – 5:30 PM.
Complimentary visitor parking available.

Greater Cincinnati Foundation
720 East Pete Rose Way, Ste. 120
Cincinnati, OH 45202

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.

- June – Register for GS 839 test to be taken in July
- September – Register for GS 849 test to be taken in October
- November – Register for GS 859 test to be taken in late December

Facilitator Biographies

Terence “Terry” L Horan, CLU, ChFC, CAP®

President and CEO of HORAN

GCF CAP® Facilitator

Seasoned by 40+ years of experience in financial services, Terry represents his clients with credentials that include being a Chartered Life Underwriter, a Chartered Financial Consultant and an Accredited Estate Planner. Terry’s extensive professional network includes legal, accounting, trust and banking representatives committed to implementing the most efficient and sensible programs for clients. Terry earned his CAP in 2019 and actively employs strategies from the program in his work with clients.

Michele Carey, CAP®

Director of Professional Advisor Relations, Greater Cincinnati Foundation

GCF CAP® Facilitator

In her role at GCF, Michele works with professional advisors and their clients to connect them with charitable resources. Michele 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. Achieving her CAP® designation in 2013, Michele employs strategies she learned from CAP to help generous people in our region create their family’s legacy.

For more information, please contact:

Michele Carey, CAP®

Michele.Carey@gcfdn.org

Direct: 513-768-6171