



Chartered Advisor in Philanthropy (CAP®)

2023 GCF Study Group Application

CAP® Overview

The Greater Cincinnati Foundation facilitates an annual study group for professional advisors to earn the Chartered Advisor in Philanthropy (CAP®) designation. This designation signifies that the student has successfully passed exams for the following three graduate-level courses:

- GS839: Planning for Impact in the Context of Family Wealth
- GS849: Charitable Giving Strategies
- GS859: Gift Planning in a Nonprofit Context

GCF Study Group

The GCF study group meets a total of 14 times over an eight-month period with each class lasting two hours (3:30-5:30pm). In addition, there are three option course recap sessions in advance of each exam. Students must commit to attending a minimum of 60% of all classes. Most students indicate they study about three to four hours in preparation for every one hour spent in the classroom.

Class size is limited to facilitate lively interaction among participants. Participants are selected based on their area of expertise and experiences they bring to the group.

The GCF study group has an alumni group comprised of professionals who have received the CAP designation as part of an earlier GCF CAP Study Group cohort.

Tuition

The tuition cost for all three courses, payable to The American College of Financial Services, is \$4,295. A nonprofit discount is available for those who qualify.

Join Us

Annually, the study group is comprised of 9-12 professional advisors from the professional areas of law, financial planning, wealth management, accounting, non-profit fundraising, and banking trust services.

You may have been referred to us by a previous CAP® graduate, or you may have inquired about the program on your own. Alternatively, we may have invited you to be a participant in the past, but due to current time constraints you asked to be considered for a future class.



2023 GCF CAP® Study Group- Application

Deadline March 8, 2023

- I understand the time and financial commitment and would like to be considered as a member of the 2023 GCF CAP® Study Group.

NAME _____

EMPLOYER _____

WORK PHONE _____ WORK EMAIL _____

PROFESSION

- | | |
|---|--------------------------------------|
| <input type="checkbox"/> Legal | <input type="checkbox"/> Nonprofit |
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Banking |
| <input type="checkbox"/> Financial Services | <input type="checkbox"/> Other _____ |

DEGREES/PROFESSIONAL DESIGNATIONS _____

YEARS OF EXPERIENCE IN YOUR CURRENT PROFESSION _____

PLEASE TELL US BRIEFLY WHY YOU WOULD LIKE TO PARTICIPATE IN THE GCF CAP STUDY GROUP (May use other additional page. Maximum 300 words.)

HOW DID YOU HEAR OF THE GCF CAP STUDY GROUP?

If applicable, please indicate any current CAP® student or graduate who could act as a reference for you.

I WOULD LIKE TO BE CONSIDERED FOR:

- 2023 CAP Group
 Future CAP Group

SIGNED _____ DATE _____

Please e-mail completed application by March 8, 2023 to:

Michele Carey, CAP®

Director of Professional Advisor Relations, Greater Cincinnati Foundation

Direct: 513-768-6171

Michele.Carey@gcfdn.org