Chartered Advisor in Philanthropy
2023 – 2024 GTCF Study Cohort
Overview & Expectations

CAP Cohort Indication of Interest Form
Enrollment Deadline: August 29, 2023

Study Cohort Orientation
Tuesday, August 29
4-5:30pm
In-Person @ GTCF Offices, 950 Pacific Avenue, Suite 1100, Tacoma, WA

CAP Annual Gathering
Tuesday, September 19
5 – 7pm
In-Person @ Titlow Lodge, 8425 6th Ave, Tacoma, WA 98465

COURSE DESCRIPTIONS

Our CAP® Study Cohort will progress through three separate courses that span nine months. Each course has a mandatory exam that you must score at 70% or higher to move on to the next course.

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

GS839 Planning for Impact in the Context of Family Wealth

Instruction Period:	September - November
Exam Window:	late November - early December (before 12/4)
In-Person Happy Hour:	December, details TBD

Meeting	Lessons covered	Co-Facilitators
9/5 Tue. 4-6pm Zoom	1. Your Seat at the Planning Table 2. The Spirit of Our Work 3. Wealth in Families 4. Family Philanthropy	Dean Carrell Stacey Guadnola
10/2 Mon. 4-6pm Zoom	5. Your Philanthropic Roadmap 6. Give Smart: Philanthropy that gets Results 7. Identity & the Adult Life Cycle in Legacy Planning 8. Free Art! The Case of the Stunned Heir	
11/6 Mon. 4-6pm Zoom	9. The Case of the Forest Primeval 10. Your Position & Your Practice 11. Cross-Cutting Summary & Exam Prep BONUS ASSIGNMENT – The Melton Case	

GS849 Charitable Giving Strategies

Instruction Period:	December - February
Exam Window:	late February - early March (before 3/4)
In-Person Happy Hour:	March, details TBD

Meeting	Content	Co-Facilitators
12/4	1. The Case of Jill Donor	Doug Page
Mon.	2. Tax Framework	Stacey Guadnola,
4-6pm	3. Charitable Remainder Trusts & Annuities	
Zoom	4. Charitable Lead Trusts	
1/2	5. Private Foundations	
Tue.	6. DAFs and Organizations Providing Them	
4-6pm	7. Life Insurance, Annuities, Qualified Plan Interests, & Bequests	
Zoom	8. Other Charitable Tools & Techniques	
2/6	9. Gifts of Noncash Assets	
Tue.	10. Three Generations of Hurleys	
4-6pm	11. Exam Review and Prep	
Zoom	BONUS ASSIGNMENT – The Riley Case	

GS859 Gift Planning in a Nonprofit Context

Instruction Period:	March - May
Exam Window:	late April - early May
In-Person Happy Hour	June, details TBD

Meeting	Content	Facilitator
3/4	1. America's Nonprofit Sector	Stephanie George
Mon.	2. Ten Basic Responsibilities of Nonprofit Boards	Stacey Guadnola
4-6pm	3. Fundraising Responsibilities of Nonprofit Boards	
Zoom	4. Cultivating and Soliciting Major, Planned, & Blended Gifts	
4/8	5. Stewardship to Accountability	
Mon.	6. Investing for Impact in The New Social Economy	
4-6pm	7. Gift Planning for Highest Capacity Donors	
Zoom		
5/6	8. Making the Shift to Donor-Centered Philanthropy	
Mon.	9. Ethics and Ideals of Gift Planning as a Profession	
4-6pm	10. Exam Review	
Zoom		

STUDY GROUP EXPECTATIONS

Class size is limited to facilitate lively interaction among participants. Participants are selected based on their area of expertise and the experiences they bring to the group. **To ensure lively discussions, study cohort members should commit to attending a minimum of 70% of the Zoom study sessions.**

The study group meets virtually September through May. Each monthly study session is from 4:00 to 6:00 p.m. via Zoom. Zoom invitations will be sent in advance of the meeting dates. There are several opportunities for in-person gatherings to help build and solidify relationships. Dates and times are subject to change; however, we will try to be as consistent as possible.

There are three courses, each with 10 – 11 lessons. You complete all lessons through self-study. Each lesson includes a lecture with slides, multiple reading assignments, and a quiz. Study sessions are scheduled about 4 weeks apart, allowing time for you to listen to the lectures, read assigned materials, and take your quizzes in advance of the meeting.

The study group sessions are not lectures. No one is directly teaching you the content. Each session will be co-facilitated by a member of the GTCF Philanthropy Team and a CAP Alumni. The sessions are used to reinforce what you learned through your own self-study. It is an opportunity to ask and answer questions, dive deeper into some of the concepts, share experiences and best practices, and build a stronger bond with your colleagues.

Study sessions are most vibrant when participants bring their own questions, examples, stories, case studies, and/or additional resources to share with the group. Participants may be asked to facilitate assigned lessons, or an entire study session. Please make every effort to attend all study group sessions. This is your opportunity to learn and to share your valuable experiences with others.

Study tips:

- Schedule your study time.
- Try to complete one lesson per week.
- Set aside 3 – 5 hours per week for each lesson.
- Complete all assignments associated with the lesson (lecture, reading, and quiz).
- Take the quizzes. They test your knowledge and prepare you for the final exams.
- Take notes while you are studying to identify key points for discussion, questions you want answered, or topics you wish to dig deeper into when the study group meets.

After each course there is an exam to be taken at an off-site testing facility. The college also offers virtually proctored exams. The exams are not cumulative and only cover the materials in each course.

REGISTERING FOR EACH TEST

- You are responsible for scheduling your tests online through Pearson Vue's website. There are three tests, one at the end of each course.
- Tests may be taken in person at a local testing center or online. You are encouraged to register for each test at least one month before you wish to take the test.