



THE
**AMERICAN
COLLEGE**
OF FINANCIAL SERVICES®



CAP®

**CHARTERED ADVISOR
IN PHILANTHROPY™**

**SERVING THOSE
WHO SERVE OTHERS**

Get to know this
important designation

CAP®: THE SIGN OF CHARITABLE GIVING EXPERTISE

What is the CAP®?

The CAP® designation is designed to bring advisors and nonprofit gift planners together to serve clients who want to plan not only for their own financial security and that of their heirs, but also to make a difference in the world. CAP® is accepted as the mark of an advisor or gift planner committed to helping those who want to give wisely and well.

CAP® designees are committed to professional and ethical best practices and must recertify this commitment annually.

Why is the CAP® different?

By earning the CAP® designation, your advisor or gift planner has made a commitment to provide a higher level of service oriented to ideals. CAP® designees are trained to collaborate across their respective disciplines to accomplish a legacy plan that embodies your highest aspirations, so you can have a great life, leave fulfilled heirs, and have a lasting impact on the causes that matter most to you.



Every CAP® attests to professional ethics and a commitment to providing a positive impact on society through charitable giving

Why select a CAP®?

A CAP® has demonstrated a commitment to holistic planning for clients who want to plan for more than money. CAP® designees are drawn from a wide range of underlying disciplines: law, accounting, fiduciary services, risk management, wealth management, estate planning, wealth management, and nonprofit gift planning. By working with a CAP®, you tap into a local and national network of top advisors and gift planners who appreciate the many dimensions of legacy planning.

With the help of your Chartered Advisor in Philanthropy®, you will be able to plan a legacy that makes sense within your financial and family circumstances, and also enables a lasting benefit for those who come after.

Benefits of working with a CAP®:

- **Determine:** How much do we need for ourselves?
- **Assess:** How much is enough, in what form, when, for our heirs?
- **Visualize:** What will our legacy be?
- **Select:** Pick the appropriate tools to set your plan in motion
- **Partner:** Join with appropriate nonprofit partners to accomplish your goals
- **Achieve Lasting Impact:** Live your best life, lead heirs by example, and achieve inspired outcomes for the causes you love

RECERTIFICATION REQUIRES

15 HOURS

of continuing education every year to maintain the CAP®.

EVERY CAP® MUST COMPLETE

3

Graduate-level courses on managing wealth in families across generations, using charitable tools to create positive social impact, and working with nonprofits to leave a lasting legacy.

What a CAP® can do for you:

CLARIFY WHAT YOU WISH TO ACCOMPLISH FOR YOURSELF, YOUR HEIRS, AND FOR SOCIETY.

EVALUATE WHAT IS POSSIBLE. HOW MUCH COULD YOU DO, WHEN, HOW? WITH WHAT IMPACT?

ASSIST IN INTEGRATING CHARITABLE STRATEGIES IN YOUR OVERALL FINANCIAL PLAN, BUSINESS EXIT PLAN, AND ESTATE PLAN SO YOUR GIVING GOES FARTHER.

ENSURE YOUR ADVISOR
**IS CREDENTIALLED
AND CURRENT:**

Visit DesignationCheck.com

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IN PHILANTHROPY[®]**

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