



THE
AMERICAN
COLLEGE
OF FINANCIAL SERVICES®

CAP[®]

Chartered Advisor in Philanthropy[®]

Delivering clients' highest aspirations

TheAmericanCollege.edu/CAP



Why Become a CAP®?

The CAP® designation empowers you with specialized expertise to help clients identify philanthropic intent and maximize their legacy for lasting impact

Becoming a CAP® professional gives you:

- ✓ Unique knowledge that spans the art and science of philanthropy
- ✓ Tools to enable you to collaborate across the table effectively
- ✓ Confidence to help clients identify and achieve their highest aspirations
- ✓ Skills to move beyond traditional estate planning and deliver greater value
- ✓ Support of a professional network in both wealth advisory and nonprofit sectors

“I highly recommend the CAP® curriculum to every charitable planning and fundraising professional. It completely transformed the way that I look at philanthropy and wealth in general.”

Philip M. DiComo, Esq, CAP®

+20%

higher growth in
production than
advisors with no
designations.¹

¹ FUSE Research Network. The American College of Financial Services Designation Outcomes Study. 2024. Based on reported three-year growth.



Your Differentiator: Specialized Philanthropic Planning Education

The College's CAP® Program is unique in its structure and specificity, combining self-study e-learning delivery that connects philanthropic advisors across the nation with a curriculum meant for professionals on both sides of donors' charitable giving plans.

The program features:



Cross-disciplinary curriculum spanning all aspects of philanthropic planning



Thriving and collaborative community of advisors and gift planners



Modern e-learning experience accessible whenever and wherever you are



Elite faculty of nationally-recognized academics and researchers



Unique synthesis of philanthropic knowledge not available anywhere else



Free consumer education program for designees to promote expertise

81%

of designees report notable improvements in client conversations.¹

¹ FUSE Research Network. The American College of Financial Services Designation Outcomes Study. 2024.

CAP[®] Program at a Glance

The College’s CAP[®] Program is ideal for experienced professionals who want to deepen their clients’ philanthropic goals, integrate charitable planning into overall estate plans, and help build lasting legacies.

Tuition	Timing	Format
\$4,495	Complete in 12 months or less	100% online, self-study

Your Learning Outcomes

- Summarize the features and benefits of popular charitable giving tools
- Analyze the tax and financial implications of assets used to fund the tools
- Recommend charitable planning tools in light of a donor or client’s overall legacy plan for self, family, and society
- Develop a charitable planning proposal for a donor or client in light of their overall legacy plan for self, family, and society

Supporting Greater Professional Diversity

The American College of Financial Services is proud to offer scholarship opportunities to individuals who have demonstrated great leadership, come from underserved or underrepresented communities, and other exceptional individuals.

Visit TheAmericanCollege.edu/Scholarships to learn more and apply.

CAP[®] Courses are available for CLE in some states.
Please visit TheAmericanCollege.edu/CAP to learn more.

Your Educational Journey Starts Here

There are no prerequisite courses required before you can begin our program. However, three years of full-time, relevant business experience are required to use the designation.

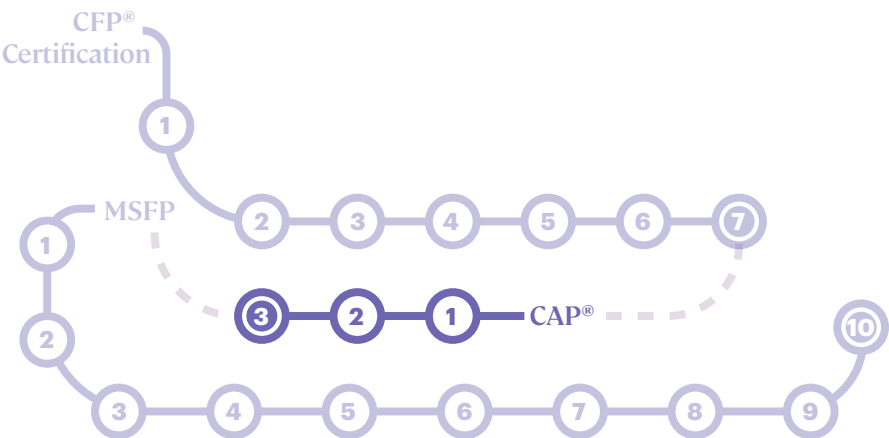
To receive and maintain the CAP® designation you must:

- Successfully complete the three required courses
- Agree to comply with The American College Code of Ethics and Procedures
- Participate in the annual Professional Recertification Program (PRP)

Your Roadmap to Success

Your learning journey doesn't have to begin or end with earning your CAP® designation. Our three-course CAP® Program can fit into any life-long learning journey with The American College of Financial Services.

Here are a few potential paths:



If you've become a CFP® Professional through The College's CFP® Certification Education Program, successfully complete (3) more courses to connect your financial planning acumen to a specialization in philanthropic planning. CAP® designees can then successfully complete a Master of Science in Financial Planning (MSFP) in Interdisciplinary Studies.

Expertise For Every Stage

The American College of Financial Services delivers applied financial knowledge and education, promotes lifelong learning, and advocates for ethical standards for the benefit of society.

As a lifelong learning partner, you will benefit from:

- Extensive professional network of one-in-five financial advisors educated by The College
- Ready-to-use knowledge delivered by plugged-in, industry-leading experts
- Interactive community engagement featuring frequent webinars, conferences, and professional development events
- Advanced planning skills and real-world application not delivered elsewhere
- Modern education through the latest in mobile-friendly, e-learning technology
- Prestigious pedigree and client recognition from nearly 100 years of academic excellence

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866-640-2210

The mark of CAP[®] is the property of The American College of Financial Services and may be used by individuals who have successfully completed the initial and ongoing certification requirements for this designation. The College can disallow use of the CAP[®] if advisors do not adhere to the program's ethical standards, continuing education, and other requirements.



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