



## ADVISORS OF COLOR 2021 CAP® STUDY GROUP #2

### Schedule of Group Study Sessions

#### **GS839: Planning for Philanthropic Impact in the Context of Family Wealth**

Introductions	Tues, April 27, 5-6:15pm ET
Assignment 1: Your Seat at the Planning Table Assignment 2: The Spirit of Our Work	Tues, May 11, 5-6:15pm ET
Assignment 3: Wealth in Families Assignment 4: Family Philanthropy	Tues, May 25, 5-6:15 pm ET
Assignment 5: Your Philanthropic Roadmap Assignment 6: Give Smart: Philanthropy that Gets Results Assignment 7: Identity and the Adult Life Cycle in Legacy Planning Assignment 8: Free Art: The Case of the Stunned Heir	Tues, June 8, 5-6:15pm ET
Assignment 9: Case of Forest Primeval Assignment 10: Positioning Your Practice and Your Process Assignment 11: Cross Cutting Summary and Exam Preparation	Tues, June 22, 5-6:15pm ET
<b>Exam period: 6/22 – 7/20</b>	

#### **GS849: Charitable Giving Strategies**

Assignment 1: The Case of Jill Donor Assignment 2: The Tax Framework for Charitable Giving	Tues, July 20, 5-6:15pm ET
Assignment 3: Charitable Remainder Trusts, Gift Annuities, and Single Premium Immediate Annuities Assignment 4: Charitable Lead Trusts	Tues, Aug 3, 5-6:15pm ET
Assignment 5: Private Foundations Assignment 6: Donor Advised Funds	Tues, Aug 17, 5-6:15pm ET
Assignment 7: Life Insurance, Annuities, Qualified Plan Interests, and Bequests Assignment 8: Other Charitable Tools and Techniques	Tues, Aug 31, 5-6:15pm ET
Assignment 9: Planning for gifts of Noncash Assets Assignment 10: Three Generations of Hurleys Assignment 11: Course Recap and Exam Preparation	Tues, Sept 14, 5-6:15pm ET
<b>Exam period: 9/14 - 10/12</b>	

## GS859: Gift Planning in a Nonprofit Context

Assignment 1: America's Nonprofit Sector Assignment 2: Ten Basic Responsibilities of Nonprofit Boards Assignment 3: Fundraising Responsibilities of Nonprofit Boards	<b>Tues, Oct 12, 5-6:15pm ET</b>
Assignment 4: Cultivating and Soliciting Major, Planned and Blended Gifts Assignment 5: From Stewardship to Accountability	<b>Tues, Oct 26, 5-6:15pm ET</b>
Assignment 6: Investing for Impact in the New Social Economy	<b>Tues, Nov 9, 5-6:15pm ET</b>
Assignment 7: Gift Planning for Highest Capacity Donors Assignment 8: Making the Shift to Donor-Centered Philanthropy	<b>Tues, Nov 23, 5-6:15pm ET</b>
Assignment 9: Ethics and Ideals of Gift Planning Professions Assignment 10: Course Recap and Exam Preparation	<b>Tues, Dec 7, 5-6:15pm ET</b>
<b>Exam period: 12/7 – 1/18/22</b>	

Each assignment includes a lecture with slides, multiple reading assignments, and a quiz. There are two practice exams at the end of each course. Please complete the lectures and be prepared to discuss learnings, share experiences and best practices at study sessions. Bring examples, stories, or additional resources to share with the group. Participants may be asked to serve as facilitator of assigned lessons, or entire study sessions. Please make every effort to attend all sessions. This is your opportunity to learn from others and to share your valuable experiences with others.

Group study sessions meet every two weeks (Tuesdays, 5:00 - 6:15pm ET) via Zoom. We will begin promptly at 5:00pm and end at 6:15pm ET.

In between courses, you will have several weeks to take the exam. Please schedule your exam time at least one month in advance as testing slots fill up quickly.

Exams include 100 multiple-choice questions. A passing grade is 70% or more. Pearson Vue manages the exams and they have on-site testing facilities. There is an option to complete a virtual exam.

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