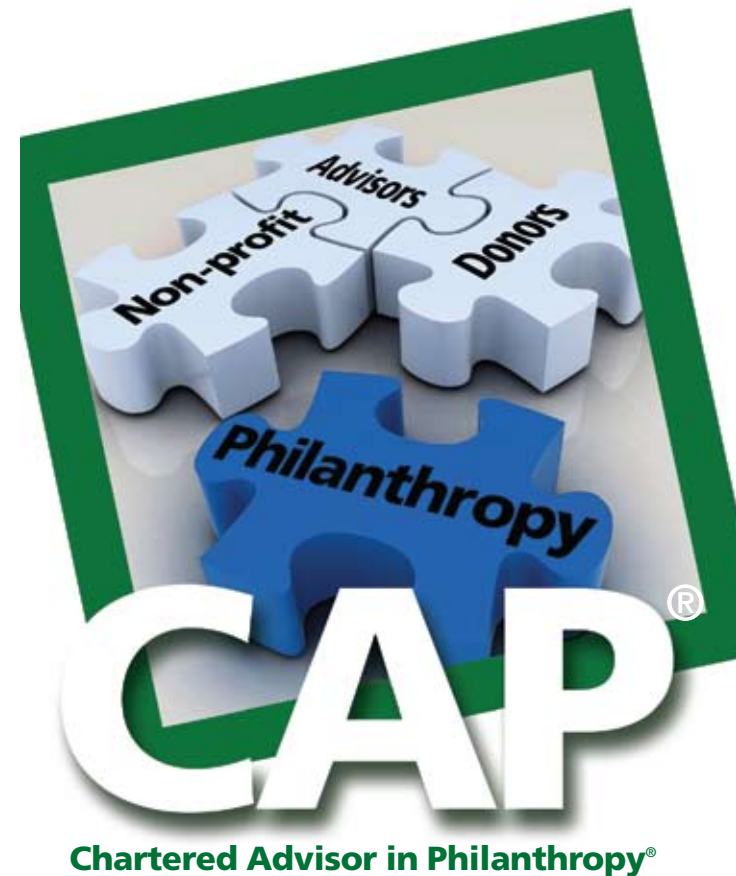




The CAP® Pin

The pin of the CAP® designation possesses a special significance. The hand holding a heart goes back to the father of Sallie B. Wallace. She and her husband William B. Wallace endowed the Wallace Chair in Philanthropy at The American College to support the CAP® curriculum. Sallie's father was a successful business executive, who, in order to make heirloom gifts for family and friends, took up silversmithing. He stamped each gift with his hallmark, the hand holding a heart. The symbol of CAP® stands for craftsmanship and love. Each gift plan is a well-crafted labor of love. Each plan is a way that a family (similar to the Wallace's) passes on a legacy of care and concern not only to family, but also to a larger community. It is true that giving people leave their mark on the world.

## What Can a CAP® Do for You?



### ABOUT THE CAP® PROGRAM

The CAP® is administered by The American College in Bryn Mawr, PA, as a graduate level program. The required course of study includes charitable tax, tools and techniques, charitable plans within the context of estate and financial planning, and the management of gift plans in a nonprofit context.

Founded in 1927, The American College is the nation's leading educator of professionals in the insurance and financial services industry.

The American College is accredited by:  
The Middle States Commission on  
Higher Education  
3624 Market Street, Philadelphia, PA 19104  
215-662-5606

[TheAmericanCollege.edu](http://TheAmericanCollege.edu)  
888-263-7265



*The mark of CAP® is the property of The American College and may be used by individuals who have successfully completed the initial and ongoing certification requirements for this designation.*

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## What a CAP® Can Do for You

A CAP® (Chartered Advisor in Philanthropy®) is qualified to help you, as a successful and caring person, create a gift plan within your overall financial or estate plan. Your gift plan will embody your ideals, as well as your traditional goals and objectives. The plan will be effective and efficient financially, while also having a positive impact on your family and on the causes you care about.

## The CAP® as a Trusted Advisor

At your planning table you will have an attorney, a CPA, and financial professionals. Your CAP® may come from an established discipline, but what makes the CAP® special is the ability to serve as your trusted advisor around vision, values, and quality of life, as well as around tools, techniques, and strategies. With a CAP® at your side, the plans you create will embody your highest aspirations, creating joy and fulfillment for you and for those you love.

## What Goes into an Inspired Philanthropic Plan?

### Vision

An inspired philanthropic plan begins with a clear understanding of you and your family's life history, current financial situation, and goals – for yourself, for your family, and for the community causes that are important to you.

### Planning

From an understanding of who you are, and what you stand for, your CAP® helps you convene a qualified planning team to take you from dreams, through plans, to implementation, and to positive impact.

### Stewardship

Plans are not all about legacies; they are also about the quality of life and how you want to invest your time and talents in activities and leadership roles that matter most to you. Your CAP® can connect you with others who share your philanthropic interests so you can learn from your peers.

[TheAmericanCollege.edu/CAP](https://TheAmericanCollege.edu/CAP)  
888-263-7265

## Life Questions

A CAP® is a qualified advisor who will help you maximize your philanthropic goals by guiding you through important life questions during the decision making process.

- What kind of person do you want to be?  
In what kind of a world?
- How much is enough for your children?  
How much is too much?
- As successful as you have been, what comes next for you?
- Are there things in life that you wanted to accomplish when you were young but have not yet accomplished? Would you like to get back to those if you can while you still have time?
- What, outside of your family and business, do you love?
- What gives you energy and pure delight?
- What keeps you awake at night as you contemplate the state of our world?
- Do your financial and estate plans embody your highest ideals?

These are the kinds of questions that your CAP® will raise as you construct a plan that will make a defining difference in your life, in your family's life together, and in your community.