



THE AMERICAN COLLEGE OF FINANCIAL SERVICES

Richard D. Irwin *Graduate School* **Student Handbook**

The American College reserves the right to make changes to the Graduate Student Handbook at any time. All graduate students of the American College are responsible for knowing, understanding, and abiding by the terms of this Graduate Student Handbook.

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1. Introduction

The rules and regulations appearing in this Graduate Student Handbook have been approved under the authority of The American College Board of Trustees and, therefore, constitute official College policy. All graduate students of The American College are responsible for knowing, understanding, and abiding by the terms of this Handbook. The regulations presented in this document outline both student rights and student responsibilities. The Student Handbook is a dynamic document. Changes are made as required in the Handbook to strengthen College procedures and students should be aware of changes that affect them. The American College reserves the right to make changes to the Graduate Student Handbook at any time. Questions related to this handbook may be directed to The Irwin Graduate School of The American College, 270 S. Bryn Mawr Avenue, Bryn Mawr, PA 19010 or e-mail graduateschool@theamericancollege.edu or by calling 610-526-1383.

2. Mission

The mission of The American College is to raise the level of professionalism in financial services by promoting ongoing education, ethical practices, and the pursuit of new knowledge for the benefit of society.

3. College Wide Policies

Below is a brief overview of College policies related to graduate studies. Students may access the full policies by clicking on the link above.

3.1 Accommodations for Students with Disabilities

Students with disabilities are served by the Professional Education Department (PED), which can be contacted at (888) 263-7265. PED is available to assist students, faculty, and College support staff in reaching a joint determination of academic accommodations for students with verifiable disabilities, where appropriate.

3.2 The Vane B. Lucas Memorial Library

The Vane B. Lucas Memorial Library features one of the most robust, online collections of financial services information in the country. The digital collection was developed to support students across all College programs, and each resource is selected to provide the most current and authoritative information on any particular topic.

Digital Resources --In addition to the comprehensive collection of The American College's study materials, the databases link students directly to the most current financial services news and data from the world's top publications.

Databases are accessible via the "Library" tab in Blackboard or at <https://www.theamericancollege.edu/resources/vane-b-lucas-memorial-library>. Database resources are available to current students only and require a Blackboard username and password to access.

Interlibrary Loan--In the event that a resource is not available in the library's collections, students are encouraged to contact a librarian for assistance in borrowing that item from another library or institution. Interlibrary loan requests are generally fulfilled within 3-5 business days. If the student needs a resource sooner, or requests a resource that is not part of another library's collection, the student is expected to acquire the resource through his or her own means, without reimbursement.

Research and Reference Help--Library staff are available for assistance by appointment, 8:30 a.m. to 4:30 p.m. Eastern Time, Monday through Friday. Students are encouraged to request appointments by email at library@theamericancollege.edu

3.3 Online Study Tools

All students of The American College are given access to The American College's Online Learning Center (OLC), Blackboard. Varying levels of access are granted and this is dependent upon the type of course the student has been enrolled in. The course delivery format determines the types of online study tools available to each student. A number of Live Webinar courses, and a variety of Self-Study courses, utilize the OLC as a mandatory portion of the curriculum. Many courses use Blackboard to give convenient access to supplementary resources intended to engage the student and enrich the learning experience.

Blackboard study tools may include:

- Access to Reading Material. All courses give students access to PDF versions of their textbook and/or study guide to quickly access them when needed.
- On-Demand Multimedia. Video and/or audio lectures are available for streaming or download for a number of College courses to provide students with an additional method of learning.
- Peer-to-Peer Learning. Ask questions of fellow students or professors in the discussion forums.
- Timely Announcements. Announcements from professors giving important information regarding course content or assignment submission.
- Practice Exams. Simulate the test day experience with our sample exams. Test gained knowledge with multiple choice and true/false quizzes.
- Virtual Classroom Experience. The live classroom experience but with the convenience of being online. Interact with professors and fellow students in live online classroom. The experience ranges from lectures to interactive question and answer to collaborative group work.
- Interactive Online Modules. In select courses, course content is delivered in an interactive, asynchronous method, using a variety of media, including video, audio, graphics, animations and slides.
- Mobile Learning. In select courses, students are able to download the e-Book version of their textbook and/or study guide and video/audio lectures to their Apple® or Android devices.

To access Blackboard, visit <http://blackboard.theamericancollege.edu>. Login with the information sent to you in the Blackboard login email.

3.4 Academic Integrity Policy

Academic integrity means that students must demonstrate honest scholarship in all academic activities associated with The College. All academic work submitted for grading, assessment of student proficiency, or consideration as original research must be the result of an individual's own efforts. Academic dishonesty generally falls into one of three categories—cheating, plagiarism, or falsification of information—which are described in The College's policy.

3.5 Nondiscrimination

The American College does not discriminate on the basis of race, religion, sex, handicap, or national and ethnic origin in its admission policies, educational programs, and activities or employment policies. It respects the right to privacy of its students and are committed to safeguarding student personal information. For more information, see TheAmericanCollege.edu.

3.6 Student Sexual Misconduct and Harassment Policy

It is the policy of The American College, in working to establish an environment of respect that is conducive to learning for every student, to view sexual misconduct and sexual harassment of students as unacceptable conduct that will not be tolerated. This policy includes all forms of

sexual misconduct, sexual harassment, sexual assault, relationship violence, and sexual violence by students, faculty, employees, or third parties while engaged in College activities.

3.7 Policy on Satisfactory Student Progress

Satisfactory academic progress is governed by two principles: The College's Limit on Repeating Failed Courses (see sections 4.14.2 and 5.9.2 below) and the 7-Year Rule for expiration of completed courses if the degree program they are part of is not completed.

3.8 Credit Hour Policy

Graduate courses are transferrable as 3-credit courses to other institutions of higher education. The Credit Hour Policy describes how The College ensures that Graduate courses meet credit hour standards.

3.9 Student Grievance Policy

The College has a process for addressing unresolved student grievances, but requests that students do the following *before* submitting a grievance:

- 1) Review the Student Handbook to ensure they understand applicable College policy;
- 2) Contact the Professional Education Department (PED) at (888) 263-7265 to attempt to resolve potential issues.

3.10 Privacy Policy

The College's Privacy Policy describes rights of access to information contained in student records and the circumstances under which student information may be released. The American College does not receive funding under any program administered by the U.S. Department of Education, and consequently, is not bound by the requirements of the Family Education Rights and Privacy Act (FERPA).

3.11 Campus Security Reporting Policy

The American College is committed to creating and maintaining a safe and positive environment for all of our students, faculty, employees and visitors to the campus. Individuals are urged to report any incidents they believe potentially endanger the safety or security of any persons on campus. The process for reporting potential issues is described in the policy.

4. Master of Science in Financial Services (MSFS)

4.1 Introduction

Today's wealthy clients are seeking increasingly complex solutions to meet their financial needs. The Master of Science in Financial Services (MSFS) provides the tools one needs to analyze, plan, and implement integrated financial and life strategies that results in growing the business in affluent markets. The MSFS program includes practical case studies and client/practitioner scenarios so that the advisor can immediately address clients' needs with expertise and confidence. With the convenience of distance learning, combined with indispensable faculty and peer interaction, the MSFS program helps the adviser understand how to gain access to advanced markets, corporate clients, and larger cases. The MSFS program may be taken self-study or live online with a professor. Visit The American College website for a detailed description of each course in the MSFS degree program.

4.2 The Mission

The mission of the Master of Science in Financial Services (MSFS) program is to provide in-depth knowledge and skills that allow financial services professionals to serve their clients more effectively and ethically. The degree emphasizes analysis, planning, and implementation of

strategies for individuals, families, and businesses to protect, conserve, and distribute financial assets. The program emphasizes the role of the financial services professional in developing a synthesis of financial resources, needs, objectives, and appropriate alternative plans for achieving the economic ends desired.

Target Audience

The target audience of the MSFS program are people with an undergraduate degree who are in the financial services industry, have strong backgrounds in other fields (e.g., CPAs, attorneys), and want to attain a more comprehensive education to prepare for or enhance a career in financial services.

Program Learning Objectives

Upon completion of this program, the student should be able to:

- Work effectively with high net worth clients
- Better integrate ethical considerations into the financial planning process
- Demonstrate mastery of knowledge in the wealth accumulation process
- Work with business owners to develop compensation succession planning and retirement strategies
- Guide individuals in the areas of tax minimization, retirement planning, and estate planning

4.3 Degree Requirements

The MSFS degree requires the completion of 12 courses (4 in residencies, 5 required, and 3 elective) or 36 course credits (each course is 3 credits). The program curriculum is:

Required Residency 1 (2 courses required)

- GS 803—Financial Statements and Business Valuation Analysis
- GS 831—Ethics and Human Values

Courses are taken in a one week on-campus residency program.

Required Self-Study or Webinar Courses (5 courses required)

- GS 811—Security Analysis and Portfolio Management
- GS 814—Qualified Retirement Plans
- GS 815—Advanced Estate Planning
- GS 817—Personal Tax Planning
- GS 842—Executive Compensation

Required Residency 2 (2 courses required)

- GS 808—Issues in Advanced Retirement Planning
- GS 807—MSFS Case Study

Courses are taken in a one week on-campus residency program.

**It is strongly recommended that the student complete the required courses before enrolling in Residency 2. Students must successfully complete GS 803 before enrolling in GS 811.*

Elective Self-Study or Webinar Courses (3 courses required; each course earns 3 credits).

The MSFS offers two concentrations: Philanthropy and Retirement Planning.

Elective requirements for the MSFS concentration in Philanthropy are 3 courses:

- GS 839—Planning for Impact in the Context of Family Wealth
- GS 849—Charitable Giving Strategies
- GS 859—Gift Planning in a Nonprofit Context

Elective requirements for the MSFS concentration in Retirement Planning are 3 courses:

- HS 353— Retirement Income Process, Strategies, and Solutions*
- HS 354— Sources of Retirement Income*
- HS 355— Managing the Retirement Income Plan*

Individuals who do not wish to have a concentration must successfully complete any 3 of the below listed courses:

- GS 838—Business Succession Planning
- GS 839— Planning for Impact in the Context of Family Wealth
- GS 840— Building and Managing the Financial Advisory Practice
- GS 849—Charitable Giving Strategies
- GS 859—Gift Planning in a Nonprofit Context

** Must successfully complete GS 808 in order to receive a transfer of credit for HS 353, HS 354, and HS 355.*

4.4 Graduate Certificates and Designation

An individual may take any self-study course in the Irwin Graduate School without being admitted to a Master's degree program. Certificate programs, outlined as follows, are designed for students that want the course knowledge and are not yet admitted to the degree program. Completion of any of these programs may qualify the student for up to nine credits toward the MSFS degree if the student is subsequently admitted to the degree program. The available certificate programs are:

- **Certified Family Business Specialist Certificate**—This program educates students to help understand the emotional issues confronted by business owners contemplating a transition of their business; identify financial issues regarding succession planning; and recognize tax considerations regarding transitioning the business. The student receives advanced education in financial statement analysis, accounting concepts in a business, business valuation, estate and gift task planning, and the process and technical requirements for successful family

business succession planning. The certificate program requires completion of three courses—GS 803, GS 815, and GS 838.

- **Estate Planning and Taxation Certificate**—The student receiving this certificate will successfully complete GS 815, GS 817, and GS 838. The certificate recipient will receive advanced education in estate and gift taxation, federal income tax planning, and business succession planning.
- **Chartered Advisor in Philanthropy (CAP) Designation**—This is a masters-level, three course curriculum providing financial advisors and fundraisers with a common body of knowledge and a common credential enabling them to collaborate effectively at the planning table when the client’s legacy is planned. The first course, GS 839—Planning for Impact in the Context of Family Wealth, connects family wealth with meaning and purpose for self, family, and society. The second course, GS 849—Charitable Giving Strategies, teaches the financial and social benefits of charitable tools. The final course, GS 859—Gift Planning in a Nonprofit Context, looks at legacy planning from the perspective of a fundraiser cultivating, soliciting, and stewarding major and planned gifts from highest capacity donors.
- **Accredited Estate Planner (AEP) Designation**—The AEP designation, granted by the National Association of Estate Planners and Councils (NAEPC), is awarded to estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character. The designation requires completion of two graduate courses through The American College in addition to other NAEPC requirements. See <http://www.NAEPC.org> for more details.

For additional information or to apply to any of these certificates and/or designations go to The American College website or email MSFS@TheAmericanCollege.edu.

4.5 Admissions Requirements

Applicants to the MSFS degree program are selected on the basis of academic and professional criteria.

All applicants must submit the below listed information to the Graduate School:

- Completed Application Form
- Current resume
- Letter of corporate approval from supervisor (if applicable)
- List of business, professional and social organizations in which the applicant has been active
- A description of your career objectives and why you believe the MSFS will help you attain them
- Signed Admissions Declaration
- Undergraduate college transcripts; must come directly from the undergraduate college
- Have a Bachelor’s Degree from a regionally accredited college/university
- Pay the admissions fee (if applicant is rejected for any reason the admissions fee is returned)

4.6 Registration Process (Except Residency)

Register by Phone: Call 610-526-1356 Monday – Friday, 8 a.m. to 4 p.m. ET

Payment is required at time of registration unless covered by a contract by a sponsoring entity. Consult the website for fees and prices of each course.

4.6.1 Admissions Fee

New students are required to pay a one-time admissions fee when enrolling in their first graduate course as part of registration.

4.6.2 Tuition and Fees

See <https://www.theamericancollege.edu/designations-degrees/MSFS> for up-to-date MSFS Admissions Fee, Course Tuition, and Residency Tuition.

4.7 Continuing Education Filing Fees

The continuing education (CE) filing fees are included in the tuition cost. Students must request CE upon registration into a course. Students requesting CE credits are required to take an Examination On Demand (EOD) to receive CE credit. For more information concerning CE processing see The American College of Financial Services website.

4.8 Scheduling the Exam

The student must wait at least two business days after registering for the course before contacting the exam center's vendor headquarters to make an EOD® appointment for the current testing window. When scheduling the appointment, the student should request a Pearson VUE Professional Center in the area where the student lives.

The vendor contact information is:

866-EXAMTAC (866-392-6822)

www.VUE.com/tac

The student should confirm the date and time of the exam appointment with the vendor headquarters at least two business days before the scheduled exam date.

Availability: The exam center needs 24 hours advance notice to schedule an exam. All appointments are made on a first-come, first-served basis and are subject to seating availability. Note that the College cannot guarantee seats at the testing facility if the student waits until the last month in the testing period to schedule the exam. No walk-in or same-day exams are available.

4.9 Exam Rescheduling

Exam rescheduling refers to when a student wants to change the date and time in which he/she will take the exam. An exam retake occurs when a student has failed an exam.

The College notifies Pearson Vue which students are authorized to take which exams. Thus, when a student calls an exam center to schedule an appointment, the center validates that the student is approved to take the exam and schedules a sitting. If a student has made an appointment and wants to change the time or date within that testing window, the student need only contact the exam center to reschedule the appointment. If the student wants to reschedule an appointment to a later testing window than scheduled for the course, the student must first contact The College so that The College can notify Pearson Vue of the change in testing window. There is a rescheduling fee to move an exam to a later testing window. If a student simply fails to schedule an exam in the designated testing window, he/she must contact The College to open a new testing window for the exam. There is a fee for this service.

4.10 Exam Retakes

If a student has failed an exam, the student must contact The College to pay the fee necessary to schedule a retake of the exam.

4.11 Testing in Webinar Courses

Professors who teach webinar courses typically will provide the student with an option of taking the exam administered by Pearson VUE Professional Center (described above) or a take-home essay exam and/or project. If the student wishes to obtain state CE credit for the course, the student must take the exam at Pearson VUE.

4.12 Transfer of Credit

A maximum of six (6) credits (the equivalent of two 3-credit courses) toward the MSFS degree may be transferred from other regionally accredited colleges or universities. The credits must be at the graduate level with courses similar in content to those of The American College; the credits must have been earned within seven years of the date of admission to the MSFS program; and the student must have earned a grade of "B" or better in each course.

A request for credit transfer must be submitted in writing to the MSFS faculty program champion and should include a description of the course for which transfer of credit is being sought and the name of the college or university where the credits were earned. The student also must have that college or university send an official transcript to the Irwin Graduate School at The American College. Transferred credits are not accepted for MSFS residency courses. For more information and an application, contact the Graduate Office.

Students completing any of The College's graduate certificate programs may transfer up to nine credits toward the MSFS degree if the student is subsequently admitted to the MSFS program.

4.13 Methods of Course Delivery

4.13.1 Webinar Class Attendance and Lateness

Students are expected to attend all classes. However, it is understood that schedule conflicts may from time to time preclude class attendance. A student is considered to be late to a webinar class if he/she logs into the classroom more than 30 minutes after the assigned starting time of the class as stated in the course syllabus.

4.13.2 Self Study

Student who chose this method of delivery will enroll in a course. Shortly thereafter the student will receive Blackboard access and study materials via mail. The student will study all of the materials and then take an EOD exam at a Pearson VUE Center.

4.13.3 Course Materials Availability for Webinars and Self-Study

Students may begin self-study courses in Blackboard by accessing <http://blackboard.theamericancollege.edu/>. Students will receive a Blackboard login email on the day their enrollment is processed. Online course materials will become available in a student's Blackboard account within 1-2 business days of receipt of the Blackboard login email.

Students can expect delivery of the hard copy textbook within 7-10 business days of enrollment. Other course materials are available in Blackboard as applicable. Access to Blackboard course materials is generally removed from the Blackboard system 6 months from the last day of the course window.

Illegal downloading of audio, video, e-books, or any other copyrighted electronic materials is prohibited. Violations brought to the attention of The American

College will constitute a violation; charges may be filed; and the violation will be addressed through the College's Code of Ethics process. Illegal downloading may also result in civil or criminal charges.

4.13.4 MSFS Residency

Residencies are taught face-to-face in a traditional classroom. The faculty has determined that the content covered in some courses is more effectively transmitted on a face-to-face basis. The MSFS program requires 2 one-week on campus residencies and student attendance is mandatory for its entire duration. Exact dates for the residencies are announced about 6 months in advance, and registration materials are sent to all students who are eligible to attend. You may also request them by contacting MSFS Graduate Administration, 610-526-1385 or MSFS@TheAmericanCollege.edu. Students should register 6-8 weeks prior to the residency start date to allow time to review the course materials. The residency courses conclude in either a paper-and-pencil exam (multiple-choice/short essay) or an assignment or project. Your advance reading materials will describe the format of the exam or final assignment. Residency tuition covers the cost of all study materials and instruction during the week. A commuter fee, covering catered breakfasts and lunches at the College, will be charged as well. The College will arrange a group rate for students in residency at a local hotel but the student will need to make reservations directly with the hotel.

4.13.5 Course Materials for Residency

Course textbooks and study guides will be shipped 6 weeks before residency. The student may receive an email from the teaching professor defining how students should prepare for the class. In addition, information related to each course is found on Blackboard.

4.14 Examinations and Grades

Students that are enrolled for self-study will take a 2-hour multiple choice exam at a local Pearson VUE Center. Students that enroll and take a course via online webinar have the option of taking the final exam at a Pearson VUE Center or taking an essay final exam. It should be noted that if the student wishes to receive CE credits for any course, it is mandatory that the exam be taken at a Pearson VUE Center.

The standard grading scale for the graduate school is:

90 – 100 = A

80 – 89 = B

70 – 79 = C

Below 70 = F

The grading scale and a grading rubric are provided in the syllabus of every course. It is strongly recommended that the student carefully read the syllabus as the first step in studying the provided materials

4.14.1 Grade Appeals/Grievance

MSFS students at The American College are entitled to file grade appeals and grievances. If the student has a grievance, he/she should try to resolve that with the relevant College representative. If the student is not able to achieve satisfaction, he/she should file an appeal with the Graduate Office. The MSFS faculty program champion will investigate the matter, or appoint one or more

individuals to investigate the matter and make a recommendation. If the student still feels that he/she has not been treated properly or fairly, the student may appeal to the College's Dean. The College Dean's decision is final.

4.14.2 Satisfactory Academic Progress

Students may complete no more than two courses in a master's program with a C grade. All remaining courses must be completed with a grade of B or above. A student who receives more than two grades of C or below will be dismissed from the program.

4.15 Program Completion

Students admitted to the MSFS program have 7 years from the date of admission to complete degree requirements. Acceptance of courses completed prior to admission will be determined by the MSFS faculty program champion. Students who have completed academic requirements are invited to participate in the College's commencement exercise at their own expense. Diplomas are ordered in June and December and take 6-8 weeks to ship.

The Office of the Registrar determines and certifies that the student has completed all degree requirements. Once certified, the student is considered to have graduated with all the rights, privileges, and obligations pertaining thereto. Degrees are awarded on the first day of the second month following the date the last examination is passed. For example, if a student completes the final course in April, the student could commence using the degree June 1.

4.16 Course Refund

The College will refund course tuition less a cancellation fee if a student requests the refund within 30 days after enrolling in the course, or in the case of a live on-site or webinar class, before the third class date, whichever is sooner. Those enrolling in course packages, where all courses are purchased at once, will be subject to separate refund arrangements communicated at the time of purchase. All refund requests should be emailed to:

MSFS@theamericancollege.edu.

5. Master of Science in Management (MSM)

5.1 Introduction

This Master of Science in Management (MSM) program is designed for executives that are seeking relevant leadership skills and strategies to grow their organizations to the next level. Its dynamic curriculum includes courses in Leading the Organization, Driving Managerial Processes and Systems, and Leader Development. Using our online learning environment promoting leadership development through peer and instructor interaction, the student gains valuable insight and maximum return on the time and resources invested. The MSM is fast-paced, compelling, and challenging, but still allows for work and family integration. This cost-effective, one-year program provides executives with essential leadership skills. The program emphasizes leading theories taught in the nation's top business universities, as well as best business practices. Program completers will not only gain a broader understanding of managerial leadership but also will develop performance improvement techniques that positively influence organizational cultures and results.

5.2 The Mission

The mission of the MSM degree program is to provide state-of-the-art advanced leadership education, knowledge and skills to its students. This degree program combines core leadership topics with the knowledge executives need to progress to the next level in thought leadership and influence within their organization. The major emphasis in the program is using leadership concepts to ethically lead the organization, drive managerial processes and systems, and leader development.

Target Audience

The target audience for the MSM program are individuals who are senior level field leaders or mid-level corporate managers with at least five years experience who want to develop more fully their leadership skills in an effort to more effectively lead the organization, drive managerial processes and systems, and develop leaders.

Program Learning Objectives

Upon completion of this program, the student should be able to demonstrate:

1. Proficiency in both written and oral communications
2. Research skills in collecting, analyzing, and interpreting information necessary to resolve difficult “real life” leadership issues with a range of possible decisions and the knowledge to effectively implement those decisions
3. Leader skill sets of understanding and applying both traditional and cutting-edge leadership theories of personal, interpersonal, and group behaviors
4. Skills in matching organizational internal capabilities with competitive opportunities in the external environment in order to develop plans designed to improve performance
5. Leader skills in ethical decision making with an emphasis on personal, social, and organizational factors affecting the decision and its implementation
6. Ability to integrate components of all other program objectives.

5.3 Degree Requirements

The MSM degree requires the completion of 30 course credits. Students are assigned to small (usually 4 or 5 persons) cohort groups and will remain in the same cohort group throughout the entire MSM program. The MSM program curriculum is:

Two Required Residencies:

Residency I—Courses are taken in a one-week on campus residency program at the beginning of the MSM

- GS 980— Ethics in Leadership
- GS 920—Personal and Interpersonal Leadership Skills
- GS 910—Leadership Development Experience—An Introduction

Residency II—Courses are taken in a one week on campus residency program at the conclusion of the MSM

- GS 900 – Communications and Leadership
- GS 990—Organizational Change/Capstone
- GS 910—Leadership Development Experience—Final Presentation

Required Webinar Courses (15 credits total). Each course earns 3 credits

- GS 930—Classic and Contemporary Leadership Studies
- GS 940—Dynamic Organizational Leadership
- GS 950—Law, Compliance, Benefits, and Social Responsibility
- GS 960—Leading Strategy Development
- GS 970—Decision Making Leadership Skills

5.4 Admissions Requirements

Applicants to the MSM degree program are selected on the basis of academic and professional criteria. All applicants must submit the below listed information to the Graduate School:

- Completed Application Form
- Current resume
- Have a Bachelor’s Degree from a regionally accredited college/university
- A description of your career objectives and why you believe the MSM will help you attain them
- Undergraduate college transcripts; must come directly from the undergraduate college/university
- Pay the admissions fee (if applicant is rejected for any reason the admissions fee is returned)

5.5 Registration Process

Register by Phone: Call 610-526-1588 Monday – Friday, 8:30 am to 4:30 pm ET

Payment is required at time of registration unless covered by a sponsoring entity contract. Consult the website for fees and prices of each course.

5.5.1 Admissions Fee

New students are required to pay a one-time admissions fee when they enroll in their first graduate course as part of registration.

5.5.2 Tuition and Fees

See <https://www.theamericancollege.edu/designations-degrees/MSM> website for up-to-date MSM Admissions Fee, Course and Residency Tuition.

5.6 Continuing Education Credits

There are no state continuing education credits for any courses in the MSM program.

5.7 Transfer of Credit

A maximum of six (6) credits (the equivalent of two 3-credit courses) toward the MSM degree may be transferred from other regionally accredited colleges or universities. The credits must be at the graduate level with courses similar in content to those of The American College; the credits must have been earned within seven years of the date of admission to the MSM program; and the student must have earned a grade of “B” or better in each course.

A request for credit transfer must be submitted in writing to the MSM faculty program champion and should include a description of the course(s) for which transfer of credit is being sought and the name of the college or university where the credits were earned. The student must also have that college or university send an official transcript to the Irwin Graduate School at The American College. Transferred credits are not accepted for MSM residency courses.

Because the MSM is a cohort-based program, students who transfer credits into the MSM program are strongly encouraged to attend and participate in those classes. Students will not be charged for attending the class(es) for which they receive transfer credits and will not be required to take the final exam. For more information, contact the Graduate Office.

Graduates of the Chartered Leadership Fellow (CLF) designation may receive a maximum of three credits towards the MSM degree. The course that transfers from the CLF is HS 384—Creative Problem Solving and the Planning Process. This course substitutes for GS 960—Leading Strategy Development. However, even though credit is provided for GS 960 the student is still expected to attend and participate in all GS 960 classes; and taking the final exam is optional. CLF graduates pay no tuition for the GS 960 course.

5.8 Methods of Course Delivery

5.8.1 MSM Residencies

Residencies are taught face-to-face in a traditional classroom. The faculty has determined that the content covered in some courses is more effectively transmitted on a face-to-face basis. The MSM program requires two one-week on campus residencies, and student attendance is mandatory for its entire duration. Exact dates for the residencies are announced about 6 months in advance, and registration materials are sent to all students who are eligible to attend. Students should register 6-8 weeks prior to the residency start date to allow time to review the course materials. The residency courses conclude in either a paper-and-pencil exam (short essay) or an assignment or project. Your advance course reading materials will describe the format of the exam or final assignment. Residency tuition covers the cost of all study materials and instruction, and the College provides both breakfast and lunch on the College campus. The College will arrange a group rate for students in residency at a local hotel but the student will need to make reservations directly with the hotel.

5.8.2 Course Materials for Residency

Course textbooks will be shipped 6 weeks before residency. Students download articles from Blackboard. The student may receive an email from the teaching professor defining how students should prepare for the class. Additional information related to each course is found on Blackboard.

5.8.3 Webinar Class Attendance and Lateness

Students are expected to attend all classes. However, it is understood that an extraordinary event may preclude class attendance. If the student misses two classes of a webinar course, the student will receive a warning communication from the teaching professor. The third time the student misses a class in the same webinar, the student will be withdrawn from the course.

A student is considered to be late to a webinar class if he/she logs into the classroom more than 30 minutes after the assigned starting time of the class as stated in the course syllabus. After three instances of lateness in a given course, the student will receive an email communication from the teaching professor that

serves as a warning. The student will be dropped from the course upon the fourth instance of lateness for any given webinar course.

5.8.4 Course Materials Availability for Webinars

Students may begin webinar courses in Blackboard by accessing <http://blackboard.theamericancollege.edu/>. Students will receive a Blackboard login email on the day their enrollment is processed. Webinar course materials will become available in a student's Blackboard account within 1-2 business days of receipt of the Blackboard login email.

Students can expect delivery of hard copy textbooks within 7-10 business days of enrollment. Other course materials are available in Blackboard as applicable.

Access to Blackboard course materials is generally removed from the Blackboard system 6 months from the last day of the course window.

Illegal downloading of audio, video, e-books, or any other copyrighted electronic materials is prohibited. Violations brought to the attention of The American College will constitute a violation; charges may be filed; and the violation will be addressed through the College's Code of Ethics process. Illegal downloading may also result in civil or criminal charges.

5.9 Examinations and Grades

Professors teaching both face-to-face and webinar courses typically provide the student with a take-home or in-class essay exam and/or project. The professor will make sure that the student knows exactly when the exams and/or projects are due to be submitted.

The standard grading scale for the graduate school is:

90 – 100	=	A
80 – 89	=	B
70 – 79	=	C
Below 70	=	F

The grading scale and a grading rubric are provided in the syllabus of every course. It is strongly recommended that the student carefully read the syllabus as the first step in studying the provided materials.

5.9.1 Grade Appeals/Grievance

MSM students at The American College are entitled to file grade appeals and grievances. If the student has a grievance, he/she should try to resolve that with the relevant College representative. If the student is not able to achieve satisfaction, he/she should file an appeal with the Graduate Office. The MSM faculty program champion will investigate the matter, or appoint one or more individuals to investigate the matter and make a recommendation. If the student still feels that he/she has not been treated properly or fairly, the student may appeal to the Dean. The Dean's decision is final.

5.9.2 Satisfactory Academic Progress

Students may complete no more than two courses in a master's program with a C grade. All remaining courses must be completed with a grade of B or above. A student who receives more than two grades of C or below will be dismissed from the program.

5.10 Program Completion

Students admitted to the MSM program have 7 years from the date of admission to complete degree requirements. Acceptance of courses completed prior to admission will be determined by the MSM faculty program champion. Students who have completed academic requirements are invited to participate in the College's commencement exercise at their own expense. Diplomas are ordered in June and December and take 6-8 weeks to ship.

The Office of the Registrar determines and certifies that the student has completed all degree requirements. Once certified, the student is considered to have graduated with all the rights, privileges, and obligations pertaining thereto. Degrees are awarded on the first day of the second month following the date the last examination is passed. For example, if a student completes the final course in April, the student could commence using the degree June 1.

5.11 Course Refund

There are no course tuition refunds.

GRADUATE DESIGNATION PROGRAMS

To receive a Graduate School designation, students must successfully complete all coursework and pass course examinations in their declared program, meet experience requirements with no ethics violations, and agree to comply with [The American College Code of Ethics](#). The Office of the Registrar determines and certifies that a student has completed all requirements.

Once certified, a student is considered to have graduated with all of the rights, privileges, and obligations pertaining thereto. Designations are delivered to students at their address of record and new designees are invited to participate in The College's periodic commencement exercises. Designation holders are subject to the College's [professional recertification requirements](#).

The duration of each course is approximately four months, but students complete coursework at their own pace. Most students progress through their declared program one course at a time, taking anywhere from one to three years to complete the program. Others progress more rapidly, completing entire programs in under a year. The College's 5-Year Rule (see [Policy on Satisfactory Academic Progress](#)) requires students to complete their declared designation program within five years to maintain the currency of their coursework.

6. Chartered Advisor in Philanthropy (CAP®)

The mission of the Chartered Advisor in Philanthropy (CAP®) designation program is to bring professional advisors and nonprofit gift planners together in common purpose with a shared credential and a common body of knowledge to better serve mutual clients in planning significant gifts.

Target Audience

- Experienced advisors whose clients are considering gifts within a financial plan, business exit plan, or estate plan; most of these advisors will have prior credentials, including some combination of CLU®, ChFC®, CFP®, MSFS, AEP, JD, LL.M. or CPA
- Gift planners serving high capacity donors; typically, these are fundraisers in the areas of major gifts or planned gifts. Some may have prior professional credentials. Community foundations and other multi-issue charities, along with established single issue charities, are among those most likely to benefit

Program Learning Objectives

Upon completion of this program, the student should be able to demonstrate an understanding of:

- 1) The collaborative skills and advisory and gift planning roles required when larger gifts are planned
- 2) Various advisory gift planning styles, and when each is appropriate given a set of client facts and goals
- 3) The main charitable tools and how each can be applied to provide specific benefits to the donor, family, and nonprofit
- 4) “Planning for impact,” that is, planning for specific impact on an issue area in the light of a theory of social change or logic model
- 5) How planned gifts and major gifts are traditionally cultivated, solicited, and stewarded within a nonprofit in the light of its mission, governance, and populations served
- 6) The ethical, professional, humane and civic ideals that CAP[®] recipients are expected to espouse

CAP[®] Curriculum

Students must complete the following required courses.

Course Number	Course Title
GS 839	Planning for Philanthropic Impact in the Context of Family Wealth
GS 849	Charitable Giving Strategies
GS 859	Gift Planning in a Nonprofit Context

UPDATED 8/19/2019