

# Chartered Advisor in Philanthropy (CAP®) Curriculum

The CAP® courses are elective courses in the Master of Science in Financial Services (MSFS) curriculum. **Each course earns the student 3 Credit Hours** toward their MSFS. Below are the approximate time requirements for each course.

## GS 839 Planning for Philanthropic Impact in the Context of Family Wealth

Assignment	Topic	Reading/Hrs	Lecture/Hrs	Total Hrs:
1	Your Seat at the Planning Table	2.5	1.5	4
2	The Spirit of Our Work	2.5	1.25	3.75
3	Wealth in Families	2.5	1.5	4
4	Family Philanthropy	3.5	1.25	4.75
5	Stages and Styles of Giving	.5	1.5	2
6	Planning for Impact	4.5	1	5.5
7	Identity and the Adult Life Cycle in Legacy Planning	4	2	6
8	Case Study: The Fitzsimmons	2.5	1.75	4.25
9	Positioning Your Practice and Your Process	2.5	1	3.5

**Total Study Time For GS 839: 37.75 Hours**

## GS 849 Charitable Strategies

Assignment	Topic	Reading/Hrs	Lecture/Hrs	Total Hrs:
1	The Case of Jill Donor	1.5	1	2.5
2	The Tax Framework for Charitable Giving	3	1.5	4.5
3	CRT, Gift Annuities, and Pooled Income Funds	2	1.5	3.5
4	Charitable Lead Trusts	1.5	1.5	3
5	Foundations and their Alternatives	1.5	1.5	3
6	Life Insurance, Annuities, and Qualified Plan Interests	2	1	3
7	Using Charitable Tools in Planning for Business Transfers	2	1	3
8	The Big Payday	1.5	2	3.5
9	Three Generations of Hurley's	1	2	3

**Total Study Time For GS 849: 29 Hours**

## GS 859 Gift Planning in a Nonprofit Context

Assignment	Topic	Reading/Hrs	Lecture/Hrs	Total Hrs:
1	America's Non Profit Sector	4	1	5
2	Good to Great in Social Sectors	2.5	1	3.5
3	Ten Responsibilities of Non Profit Boards	2.5	1.5	4
4	Fundraising Responsibilities of Non Profit Boards	3	.5	3.5
5	Major Gifts and Planned Giving	3	1	4
6	From Stewardship to Accountability	3	1	4
7	Cultivating and Soliciting Major and Planned Gifts	1.5	1.5	3
8	Philanthropic Planning in the New Social Economy	2.5	1.5	4
9	Ethics and Ideals of the Gift Planning Professional	1	1.5	2.5

**Total Study Time For GS 859: 33.5 Hours**

