
PLANNED GIVING ROUND TABLE OF ARIZONA

THE “WHAT’S SO” OF DESIGNATIONS AND CERTIFICATIONS

Patricia J. Elder, CPA, MBA, CAP®

Russ Bucklew, CFP®, JD, CEPA, CAP®, EA

Lori Shepard, CFRE, CAP®, MPA

Tiffany House, CAP®, CEPA, FCEP

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- CAP® = Chartered Advisor in Philanthropy
 - CFRE = Certified Fund Raising Executive
 - CPA = Certified Public Accountant
 - EA = Enrolled Agent (can do taxes)
 - CFP® = Certified Financial Planner
 - FCEP = Fellow in Charitable Estate Planning
 - JD = Juris Doctor = (Attorney)
 - CEPA = Certified Exit Planning Advisor

TRUSTED ADVISORS

TAX

- Certified Public Accountant, CPA
- Enrolled Agent, EA
- CFO
- Bookkeeper

LEGAL

- Estate Planning Attorney
- Tax Attorney
- Business Transactional Attorney
- Real Estate Attorney
- Elder Law

FINANCIAL

- Certified Financial Planner, CFP
- Financial Advisor
- Stock Broker
- Banker

INSURANCE

- Life Agent
- Long Term Care
- Property and Casualty
- Commercial Insurance
- Group Benefits

OTHER TRUSTED ADVISORS

BUSINESS TRANSITION

- Business Broker
- Certified Exit Planning Advisor, CEPA, CBEC
- Mergers and Acquisitions Advisor, M&A
- Psychologist
- Family Business Transition Advisor

ELDER CARE

- CCRC
- Elder Placement Specialist

REAL ESTATE

- Residential Broker
- Commercial Broker
- Qualified 1031 Exchange Intermediary

OTHERS

- CAP
- DAF
- FCEP
- Corp Trustees
- Appraisers