THE AMERICAN COLLEGE

CAP 2010

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

Description

GS 839 focuses on how clients and donors can use financial planning, estate planning, and gift planning to advance their personal financial goals while also having a positive impact on their heirs and on their community.

Learning Objective

By the end of this course, you will be able to:

- Understand your role at the planning table where the client or donors last will and testatment are planned
- Be able to emerge as the client or donor's trusted advisor, integrating charitable planning with the donor or client's overall estate and business planning.

Assignments

1. Your Seat at the Planning Table
2. The Spirit of Our Work
3. What it Means to be a CAP
4. Wealth in Families, I
5. Wealth in Families II
6. Youth Giving
7. Planning for Philanthropic Impact in the Context of Family Wealth
8. The Fitzsimmons Case
9. Marketing Philanthropy as a Virtue
10. Planning for Action: Writing Your "About Us" Capability Statement

Texts

Scott and Todd Fithian, *The Right Side of the Table: Where do You Sit in the Minds of the Affluent?*
Charles Collier, *Wealth in Families, Second Edition*

Readings

H. Peter Karoff, "The Long Distance Call"
Paul Schervish, "The Moral Biography of Wealth"
Thomas Backer, and Lili Freidland, "Donor Advisors and Philanthropic Strategy"

William Wallace, “Remarks to the 2008 Annual Membership Meeting of Society of Financial Services Professionals at Bethesda Country Club”
Phil Cubeta, “A Primer on Youth Giving”
Ellen Remmer, “Raising Children with Philanthropic Values”
Phil Cubeta, “Planning for Philanthropic Impact in the Context of Family Wealth”
Phil Cubeta, Tracy Gary, and Randy Fox, “Inspired Planning for Optimal Outcomes: The Fitzsimmons Case”
Tracy Gary, “12 Elements of Inspired Planning”
Phil Cubeta, “Cultivating Philanthropy as a Virtue”
Phil Cubeta, “”Marketing Philanthropy to Birds of a Feather”

GS 849: Charitable Strategies

Description

GS 849 focuses on the tools and techniques of charitable planning in a financial, tax, and legal context.

Learning Objective

- Be able to understand and evaluate each primary tool or technique of charitable planning.
- Be able to show how charitable tools can benefit the donor, family, and the organizations the client loves, leads, and supports support.

Assignments

1. A Conceptual Framework for Multi-Dimensional Philanthropic Planning
2. The Case of Jill Donor: How A CAP Saved the Day
3. The Transfer Tax and Income Tax Framework for Philanthropic Planning
4. Direct Gifts, Bequests, Bargain Sales, Conservation Easements, Life Estates, Gifts of Real Estate, Life Insurance, Annuities, and Qualified Plan Interests
5. Charitable Remainder Trusts, Gift Annuities, and Pooled Income Funds
6. Charitable Lead Trusts
7. Private Foundations, Operating Foundations, Supporting Organizations, Community Foundations, and Donor Advised Funds
8. Transferring Closely Held Business Interests with Charitable Tools
9. Case Patterns for Practice
10. The Big Pay Day: A Video Enactment of a Family Meeting in which the Heirs Learn that their Inheritance is going to Charity

Texts

Biebl and Ranweiler, *Charitable Strategies, 2010 edition*

Readings

Phil Cubeta, “A Conceptual Framework for Multi-Dimensional Philanthropic Planning”
Phil Cubeta and H. King McGlaughon, “The Case of Jill Donor: How the CAP Saved the Day”
Ted Kurlowicz, “The Transfer Tax Framework for Charitable Giving”
Greg Baker and Ted Batson, “CRT Handbook”
Greg Baker, “Business Uses of CRTS and Donor Advised Funds”
Greg Baker, “Planning with Charitable Gift Annuities”
Bryan Clontz, “Charitable Uses of Life Insurance”
Foundation Source, “Hallmarks of a Well Run Foundation”
Dan Daniels and David Leibell, “Planning for the Closely Held Business Owner: The Charitable Options”
Phil Cubeta, “Doing Good, Doing Well, while Doing No Harm: An English Major’s Guide to Philanthropic Planning”
Shaking the Tree Players, “The Big Payday” with a video introduction by a family business psychologist and a reading he provides.

GS 859: Gift Planning in a Nonprofit Context

Description

GS 859 focuses on what nonprofits call “planned giving.” The course is designed to help board leaders, advisors and nonprofits collaborate to create, count, and steward significant gifts.

Learning Objective

By the end of this course, you will be able to:

- Work effectively with allied professionals to uplift a planned giving program for a nonprofit by working with its board level donors.

Assignments

1. The Future of Planned Giving
2. The Nonprofit Board
3. The Nonprofit Board, II
4. Stewardship of Planned Gifts
5. Cultivation and Solicitation of Planned Gifts
6. Anatomy of a Gift Solicitation
7. Becoming a Trusted Advisor
8. The Structure of Trust Building
9. Partnering with Advisors for Optimal Outcomes
10. Ethics and Ideals of Gift Planning as a Profession

Texts

Sturtevant, *The Artful Journey*
Maistre, *The Trusted Advisor*

Readings

Robert Fogal, “Designing and Managing the Fundraising Program”
Kathryn Miree, “Getting Serious About Endowment Building”
Kathryn Miree, “The Role of Planned Gifts in Major Gifts”
Kathryn Miree, “Asking the Right Questions: The Mysteries and Metrics of Planned Giving”
“The Future of Charitable Gift Planning: A Report of the NCPG Strategic Directions Task Force”
“The Sarbanes Oxley Act”
Laurence Siegel, “Investment Management for Endowed Institutions”
Eugene Maloney, “The Investment Process Required by the Uniform Prudent Investor Act”
Greg Baker and Ted Batson, “Charitable Remainder Trust Handbook”
Barney Austin, “The Hazards of Unmanaged Life Insurance Policies”
“What is a Gift Annuity?” from the American Council on Gift Annuities
Bryan Clontz, Charitable Gift Annuity Reinsurance”
Kathryn Miree, “Understanding and Drafting Gift Acceptance Policies”
Partnership for Philanthropic Planning, “Guidelines for Reporting and Counting Planned Gifts”
Richard Fox, “Princeton and Robertson Family Settle Bitter and Long-Standing Litigatio over Donor Intent”
Susan Gary, UMIFA Becomes UPMIFA”
Kathryn Miree, “Identifying Professional Relationships that Make a Difference”
Joel Breitstein, “Donor/Client: The Two Faces of a Prospect”
Charles Maclean, “Financial Advisors as Guiding Stars to Philanthropic Giving?”
Tracy Gary, “The Case of the Willing Fundraiser”
Tanya Johnson, “Partnership in Practice”
Ron Duska and Phil Cubeta, “The Ethics and Ideals of Gift Planning as a Profession”