Omaha Community Foundation

CHARTERED ADVISOR IN PHILANTHROPY®

Thank you for your interest in the Chartered Advisor in Philanthropy® (CAP) Study Group Program. The CAP program was founded in 2012 by Mark Weber, JD, CAP®, and hosted by the Omaha Community Foundation with the sole purpose of making Omaha a more generous community. This "By-Invitation- Only" program brings together some of Omaha's top professional advisors (accountants, attorneys, financial advisors) with nonprofit development professionals to learn collaboratively about philanthropy.

The program consists of 15 two-hour class sessions spread over an 8-month period (May-December). Upon successfully completing the program, you will earn the Chartered Advisor in Philanthropy®(CAP) designation. The program combines online lectures conducted by The American College and in-person classes with cross-discipline small group discussions and outside speakers. You will earn 9 hours of graduate-level credit from The American College.

To provide you with a more in-depth understanding of the program, please review the attached materials:

1. CAP® Course Overview
2. CAP® Calendar
3. CAP® Past Participants
4. CAP® Past Speakers
5. CAP® Testimonials
6. CAP® Indication of Interest Form

If you have questions about the upcoming CAP® program please feel free to reach out to Kelli Cavey, Vice President of Donor Services, at kelli@omahafoundation.org or (402) 614-9510.

Mark Weber

Course Overview

The Chartered Advisor in Philanthropy (CAP®) program is a year-long series of courses that teach professional advisors how to best help clients discover the legacies they will leave their families and community. The program provides professionals with the knowledge and tools needed to help clients reach their charitable giving objectives while also helping them meet their estate planning and wealth management goals. By integrating the professions of law, accounting, financial services, and planned giving, the Omaha Community Foundation promotes an inter-disciplinary approach to most effectively achieve their client's goals.

The CAP® program involves passing three graduate level courses and meeting in 15 class sessions. The American College, in King of Prussia, PA, is the nation's leading educator of professionals in the insurance and financial services industry providing remote learning throughout the country. Over 2,500 individuals have been awarded the CAP® designation since its inception in 2003.

The Omaha CAP® Study Group Program was founded and led by Mark A. Weber and is administered by the Omaha Community Foundation.

COST

For-profit professional advisors: $4,495 (includes all three courses)
Nonprofit professionals: $3,695 (includes all three courses)
There are limited scholarship opportunities available based on need, with preference given to smaller nonprofits.

COURSE DESCRIPTIONS

CAP® is made up of three separate courses that span roughly eight months with a one-month break between the three. Each course has a mandatory exam that you must score at 70% or higher to move on to the next course. Here are the course definitions:

GS839: Planning for Philanthropic Impact in the Context of Family Wealth. In this course you learn how clients and donors can use financial planning, estate planning, and gift planning to advance their personal financial goals for self and family, while also having a positive impact on their community.

GS849: Charitable Giving Strategies. In this course you learn how to explain and place the most common charitable strategies-both one by one and within an overall plan to achieve donor goals for self, family, and community.

GS859: Gift Planning in a Nonprofit Context. This course 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.

CONTINUING EDUCATION

Attendance is taken at every class and all three exams are completed at a nationally recognized professional testing center. The Omaha CAP® Study Group Program has been approved for continuing education credit in past years and may be approved for credit in future years.

FACILITATOR BIOGRAPHIES

MARK WEBER, JD, MSFS, CLU, CHFC, CAP®
Legacy Spectrum Advisor LLC

Mark A. Weber is the President of Legacy Spectrum Advisor LLC. After a distinguished career as a financial advisor, Mark is now an author, educator, and public speaker. Mark introduced the idea of the CAP® Study Group Program to Omaha in 2012 and is the primary facilitator of the Chartered Advisor in Philanthropy classes.

KELLI CAVEY, JD, CAP®
Vice President of Donor Services, Omaha Community Foundation

Kelli Cavey is the Vice President of Donor Services at the Omaha Community Foundation where she focuses on the Foundation's impact investing program. Kelli also works closely with Foundation donors and their advisors to facilitate efficient and impactful charitable giving. Prior to joining the Foundation, Kelli practiced law as an estate planning attorney for over ten years. Kelli currently assists in the facilitation of the Omaha CAP® program.

2024 Class Schedule

GS 839: PLANNING FOR PHILANTHROPIC IMPACT IN THE CONTEXT OF FAMILY WEALTH

Date	Topic	
May 1	Your Seat at the Planning Table	Assignment 1
	The Spirit of Our Work	Assignment 2
May 8	Wealth in Families	Assignment 3
	Family Philanthropy	Assignment 4
	Register for GS 839 test.	
May 22	Your Philanthropic Roadmap	Assignment 5
	Styles of Philanthropic Grant-Making	Assignment 6
June 5	Identity and the Adult Life Cycle in Legacy Planning	Assignment 7
	Three Generations of Philanthropists	Assignment 8
June 18 (Tuesday)	Case of the Forest Primeval	Assignment 9
	Your Position and Your Practice	Assignment 10
	Course Summary and Exam Prep	Assignment 11
July 9	Take Test for GS 839 by this date	
Bonus Assignment	*The Melton Case*	

GS 849: CHARITABLE GIVING STRATEGIES

Date	Topic	
July 10	The Case of Jill Donor	Assignment 1
	The Tax Framework for Charitable Giving	Assignment 2
July 24	Charitable Remainder Trusts, Gift Annuities, and Single Premium Immediate Annuities	Assignment 3
	Charitable Lead Trusts	Assignment 4
	Register for GS 849 test.	
August 7	Private Foundations	Assignment 5
	Donor Advised Funds and Organizations Providing Them	Assignment 6
	Life Insurance, Annuities, Qualified Plan Interests, and Bequests	Assignment 7
August 21	Other Charitable Tools and Techniques	Assignment 8
	Planning for Gifts of Noncash Assets	Assignment 9
	Three Generations of Hurleys	Assignment 10
September 4	Course Recap and Exam Preparation	Assignment 11
September 24	Take Test for GS 849 by this date	

THE AMERICAN COLLEGE OF FINANCIAL SERVICES
630 Allendale Road, Suite 400
King of Prussia, PA 19406
TheAmericanCollege.edu
Contact: Jennifer Lehman – (610) 526-149 or
jennifer.lehman@theamericancollege.edu

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GS 859: GIFT PLANNING IN A NONPROFIT CONTEXT

Date	Topic	
September 25	America's Nonprofit Sector	Assignment 1
	Ten Basic Responsibilities of Nonprofit Boards	Assignment 2
October 9	Fundraising Responsibilities of Nonprofit Boards	Assignment 3
	Cultivating and Soliciting Major, Planned, and Blended Gifts	Assignment 4
	Register for GS 859 test.	
October 23	Stewardship to Accountability	Assignment 5
	Investing for Impact in The New Social Economy	Assignment 6
November 6	Gift Planning for Highest Capacity Donors	Assignment 7
	Personalized Philanthropy: Crash the Fundraising Matrix	Assignment 8
November 20	Ethics and Ideals of Gift Planning as Profession	Assignment 9
	Course Recap and Exam Preparation	Assignment 10
December 31	Take Test For GS 849 by this date	

REGISTERING FOR EACH TEST

There are three tests. You are responsible for scheduling your tests online through Pearson Vue exams at the following website: https://home.pearsonvue.com/tac/onvue

Tests may be taken in person at a local testing center or online. You are encouraged to register for each test at least one month before you wish to take the test.

FOR MORE INFORMATION, CONTACT KELLI CAVEY, VICE PRESIDENT OF DONOR SERVICES, AT KELLI@OMAHAFOUNDATION.ORG OR (402) 342-3458

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Participant List with Class Designation

ACCOUNTING

Tyler Bartruff, *Lutz* (7)
Jason Bombeck, *FORVIS* (9)
Allie Boulay, *Deloitte* (12)
Ben Burton, *Lutz* (12)
Wendy Cooley, *Eide Bailly, LLP* (10)
Joe Donovan, *Lutz* (11)
Ralph Dovali, *The McMillen Company, PC.* (6)
Mark Dynek, *AGSN* (11)
Steve Esch, *Avior Wealth Management* (11)
Pete Froelicher, *Lutz* (2)
Brian Gough, *Hancock & Dana, PC* (9)
Andrew Guill, *10 Roads Express* (4)
Greg Harr, *O'Donnell, Ficenec, Wills & Ferdig LLP* (2)
Tom Hosier, Berger, *Elliott & Pritchard CPAs, LLC* (3)
Steven Kenney, *Lutz* (4)
Laura Latka, *FORVIS* (12)
Mike McDevitt, *BKD, LLP* (6)
Troy McKinney, *Bland & Associates PC* (5)
Matt Mercer, *Deloitte* (2)
Matt Muehling, *Deloitte* (7)
Janie Meyer, *Eide Bailly, LLP* (11)
Janet Osborn, *Hancock & Dana, PC* (5)
Deyna Rouse, *Creighton University* (9)
Ken Patry (1)
Jeff Snyder, *Lutz* (1)
Leonard Sommer, *Hancock & Dana, PC* (4)
Lisa Strutzel, *LAF Family Wealth Advisors, LLC* (5)
Jim Sousley, *Eide Bailly, LLP* (3)
Kim Sucha, *KPMG* (3)
Larry Tennison (1)
Randy Kathol, *Eide Bailly, LLP* (8)
Andrew Worthington, *Frankel Zacharia LLC* (6)

FINANCIAL SERVICES

Anthony Anderson, *State Farm Insurance* (11)
Jim Ambrose, *Merrill Lynch* (2)
Abby Arcishewsky, *Archway Consulting* (12)
Mike App, *Bridges Trust* (9)
Bob Bertsch, *Union Bank & Trust Company* (2)
Jim Boulay, *Lutz Financial* (5)
Dale Christenson, *UBS Financial Services* (4)
Brandon Dirkschneider, *Insurance Design Management* (10)
John Gessert, *Union Bank & Trust Company* (9)
C.J. Guenzel, *First Nebraska Trust Company* (5)
Nicholas Hall, *Lutz Financial* (11)
Joe Hefflinger, *Lutz Financial* (8)
Jason Hiley, *Hiley Hunt Wealth Management* (1)
Jack Holmes, *Bridges Trust* (12)
James Huerter, *Security National Bank (*10)
Daniel Kline, *First National Bank* (6)
Susan Koesters, *D.A. Davidson & Co.* (1)
Dan Lindstrom, *UBS Financial Services* (2)
Brett Lindstrom, *Bridges Trust* (12)
Marietta Luellen, *Bridges Trust* (3)
Brady Marlow, *Carson Wealth Management* (7)
Megan McMurry, *Bridges Trust* (6)
Brian Miles, *Bridges Trust* (4)
E.J. Militti, *Morgan Stanley* (5)
Eryka Morehead, *Collaborative Planning Group* (5)
Bob Mundy, *Mundy & Associates* (3)
Stacie Neussendorfer, *Foster Group* (4)
Steve Seline, *Walnut Private Equity Partners* (10)
James Shoquist, *Northwest Wealth Management Inc.* (10)
Jenny Strako, *Compass Philanthropic* (8)
Thomas Sudyka, *Lawson Kroeker Investment* (6)
Joe Vlock, *Vlock Financial Group* (1)
Mark Weber, *Legacy Spectrum Advisor, LLC* (1)
Robert Wellendorf, *Executive Solutions* (4)
Paul West, *Carson Wealth Management* (8)
Kevin Welsh, *Morgan Stanley* (3)
Sherman Willis, *State Farm Insurance* (11)
Nick Wilwerding, *Bridges Trust* (7)

LAW

Austin Bradley, *McGrath North* (7)
Ben Deaver, *Pansing, Hogan, Ernst, and Bachman LLP* (9)
Dan Dittman, *Erickson & Sederstrom* (5)
Sarah Duey, *Smith Pauley LLP* (7)
Brett Ebert, *Ball, Loudon, Ebert & Brostrom, LLC* (10)
Laura Essay, *Dvorak Law Group, LLC* (9)
Howard Epstein (2)
Amanda Forker, *Baird Holm* (6)
Gary Gotsdiner, *McGill, Gotsdiner, Workman & Lepp* (2)
Adam Grieser, *Fraser Stryker PC LLO* (10)
Jon Grob, *McGrath North* (5)
Dan Guinan, *Fraser Stryker PC LLO* (3)
Brandon Hamm, *Koley Jessen, PC LLO* (3)
Katie Joseph, *Cline, Williams, Wright, Johnson & Oldfather* (11)
Kris Karnes, *First National Bank of Omaha* (12)
Colin Kastrick, *Kastrick Law* (12)
Tom Kelley, *McGrath North* (2)
Sharon Kresha, *Baird Holm LLP* (1)
Ronald Lee, *Mutual of Omaha-Income & Wealth Planning Solutions* (8)
Rob Likes, *Likes Meyerson Hatch LLC* (2)
Tom Malicki, *Abrahams Kaslow & Cassman LLP* (2)
Jill Mason, *Kinney Mason* (11)
Nick Meysenburg, *Dvorak Law Group LLC* (12)
Nick Montague, *Smith Pauley LLP* (8)
Trent Reinert, *McGill, Gotsdiner, Workman & Lepp* (7)
Susan Rosburg, *First National Bank of Omaha* (11)
Andrew Sigerson, *Legacy Design Strategies, P.C., LLO* (10)
Jesse Sitz, *Baird Holm* (4)
Nick Taylor, *Fitzgerald, Schorr, Barmettler & Brennan, PC, LLO* (1)
James Tews, *Koley Jessen, PC LLO* (6)
Mary Vandenack, *Vandenack, Weaver and Truhlsen, LLC* (7)
Daniel Waters, *Lamson Dugan & Murray, LLP* (5)
Mike Weaver, *Vandenack, Weaver and Truhlsen, LLC* (3)
David Wilson, *Walentine O'Toole* (4)
Alex Wolf, *Koley Jessen, PC LLO* (5)
Sean White, *Cline, Williams, Wright, Johnson & Oldfather* (4)
Clark Youngman, *Koley Jessen, PC LLO* (11)

OTHER

Todd Clarke, *Jacob Partners, LLC* (7)
Dan Hamann, *Spectrum Financial Services, Inc.* (9)

Jeff Gordman, *Jeff Gordman Advisory LLC* (7)
Andrea Marshall, *Andrea Marshall Consulting*, (12)
Ron Quinn, *Tenaska* (1)

NONPROFIT

Katie Bakhit, *Duchesne Academy of the Sacred Heart* (4)
Jeff Beckman, *The Salvation Army* (8)
Jeremy Belsky, *Boys Town* (3)
Kathy Bertolini, *CHI Health* (10)
Sara Boyd, *Ascend Advisory LLC* (1)
Kyle Cartwright, *Civic Nebraska* (9)
Kelli Cavey, *Omaha Community Foundation* (6)
Karen Cimpl Hotz, *Marian High School* (6)
Renee Coughlin, *MOSAIC* (6)
Pat Crisler, *Metropolitan Community College Foundation* (1)
Diane Crowley, *USA Midwest Province of the Society of Jesus* (8)
Matt Darling, *Oakdale Strategies* (2)
Vanessa Denney, *Omaha Community Foundation* (11)
Elizabeth Donner, Boys & Girls Clubs of the Midland (12)
CK Duryea, *University of Nebraska Foundation* (2)
Nate Driml, *Madonna Rehabilitation Hospitals* (10)
Terri Fallin, *Consultant* (4)
Mike Findley, *Creighton University* (3)
Linda Garbina, *Joslyn Castle* (5)
Cesar Garcia, *Canopy South* (11)
Matt Gerard, *Creighton University* (12)
John Glenn, *Madonna Rehabilitation Hospital* (5)
Stacey Goodman, *Iowa West Foundation* (4)
Steven Hill, *University of Nebraska Foundation* (5)
Steven Jerina, *Rollins College* (8)
Tom Kerfoot, *Children's Hospital & Medical Center Foundation* (6)
Chris Knauf, *Mount Michael Benedictine Abbey* (11)
Donna Kush, *Omaha Community Foundation* (10)
Tony LaMar, *Archdiocese of Omaha* (9)
Tracy Madden-McMahon, *Methodist Hospital Foundation* (3)
Anne Meysenburg, *Omaha Community Foundation* (12)
Catherine French McGill, *Nebraska Philanthropic Trust* (8)
Lauren Steier Miltenberger, *University of Nebraska Foundation* (9)
Charles Olsen, *Suzanne & Walter Scott Foundation* (7)
Juan Padilla, *Canopy South* (9)
Ryan Pickett, *Boy Scouts, Mid-America Council* (11)
Emily Prauner, *Fontenelle Nature Association* (10)
Joe Reding, *St. Stephen the Martyr Catholic Church* (5)

Erin Russell, *Heider Family Foundation* (2)
Dana Ryan, *Methodist Hospital Foundation* (12)
Shannon Sands, *Springfield Community Foundation* (6)
Steve Scholer, *Creighton University* (1)
Robert Skrydlak, *Creighton University* (4)
Louri Sullivan (5)
Michael Thompson, *Boys Town (*10)
Jennifer Tompkins, *Jewish Federation of Omaha Foundation* (11)
Karen Van Dyke, *Educate Uganda* (10)
Albert Varas, *Latino Center of the Midlands* (12)
Sabrina Weiss, *Omaha Performing Arts* (7)

Omaha Community Foundation

CHARTERED ADVISOR IN PHILANTHROPY®

Previous Guest Speakers

As guest speakers for the CAP® program, these local Philanthropists and nonprofit leaders have shared their real world experiences and knowledge.

Speaker	Topic
Jim Ambrose, Sharon Kresha, & Larry Tennison	Three veteran advisors (accountant, attorney, and wealth manager) and Chartered Advisors in Philanthropy shared how they have effectively collaborated as a "team" to deliver the highest level of service to clients.
Fred Amis	This entrepreneurial philanthropist is an unabashed risk taker when it comes to deploying his charitable dollars to make ours a better community. When he gives, he measures outcomes and expects to change behaviors!
Jeremy Belsky, C.K. Duryea, Steve Scholer, & Howard Epstein	Four veteran planned giving professionals discussed the ethical responsibilities of their profession while sharing conflicts of interests that can arise and how they deal with them.
Mogens Bay	Born in Denmark, with experience working in China, this global citizen is the CEO of a Fortune 500 doing business around the world. As a trustee of four local nonprofit boards controlling more than $2 billion in assets, he indicated that effectively distributing this much money requires strong leadership, staying true to the founder's intentions, and the willingness to take risks.
Sara Boyd	The former CEO of one of the country's most successful community foundations described the donor services available, programs offered to foster the development of fledgling nonprofits, tax advantages of community foundations, and meeting the needs of a diverse donor base.
Phil Buchanan	This Boston based nonprofit CEO shared his thoughts on his recently released book "Giving Done Right" on effective philanthropy and how to make every dollar count.

Speaker	Topic
Dale Christenson, Leonard Sommer, & Nick Taylor	A panel comprised of a wealth manager, an accountant, and an estate planning attorney (all graduates of the CAP® program) discussed how, why, and when it makes sense to collaborate as professional advisors to deliver greater client value and satisfaction.
Wendy Boyer & Brenda Mainwaring	These executive directors shared the rewards and challenges of making grants from two of our community's most established foundations, and balancing grantmaking that aligns with their founders' intentions, while at the same time addressing changing societal and community needs.
Kyle Cartwright	CAP graduate, Kyle described how Certified B Corporations are businesses that meet the highest standards of verified social and environmental performance, public transparency, and legal accountability to balance profit and purpose. Kyle's company is on target to quadruple the number of Nebraska B-corporations within the next year joining nationally known companies such as Ben & Jerry's and Patagonia.
Kelli Cavey & Jesse Sitz	These two CAP graduates, estate planning attorney turned foundation director, Kelli Cavey, and practicing estate planning attorney, Jesse Sitz, described in detail how one of the country's most successful community foundation's is using Impact Investing to ignite and magnify philanthropic investment through a Community Loan Fund. This new frontier of entrepreneurial philanthropy holds great promise for small start-up businesses and affordable housing projects.
Todd & Eric Clarke	Stunned by the sudden loss of their father and brother in a plane crash, these two brothers propelled the business founded by their father to a national success story. As young philanthropists, they are learning to follow their passions with both money and leadership.
Brian Clontz	One of the nation's foremost experts on the taxation of innovative charitable giving strategies shared case studies on how donors have used hard-to-value, illiquid assets to make sizeable charitable gifts, providing attractive tax benefits to the donor and meaningful gifts to the community.

Speaker	Topic
Phil Cubeta	The developer of the CAP® curriculum and the voice behind the online lectures shared the impact CAP® is having on communities around the country.
Wynter Davis & Donna Kush	The Omaha Community Foundation has expanded into impact investing. Partnering with a local organization to replace usurious "pay day lending" with affordable micro-lending and financial literacy education, they are stimulating economic growth in impoverished areas.
Sid Dinsdale	This CEO of a multi-generational family owned bank with operations in over 150 locations across 8 states and more than $18 billion in assets, shared some of his challenges, but also the opportunities to help small communities grow through both good business practices and philanthropy.
Ralph Dovali & Amanda Forker	These two CAP graduates used personal experience and real-life examples from their respective practices in accounting and law to guide students through the nuances of split-interest gifts and charitable trusts and their tax implications.
Bill Fitzgerald	When this fourth generation business went public and was "monetized," this CEO shared how he used a portion of the proceeds to continue his family's generational philanthropy while including his children in the process.
Mary Lee Fitzsimmons	An experienced veteran of the nonprofit sector, this philanthropic consultant shared best practices of nonprofit boards and insights on how to be an effective board member.
Cesar Garcia	This accomplished civil engineer who transitioned to the non-profit sector to oversee a massive revitalization of affordable housing in South Omaha, shared his vision of a mostly poor immigrant population building wealth by investing in their own community.
Ron Gartlan	From humble beginnings, this CEO of a nationally known food chain shared his thoughts on narrowing the charitable causes one supports; giving deeply to a few; and committing one's time and leadership for decades. This formula has provided him with much joy and a sense of accomplishment.

Speaker	Topic
Jeffrey Gold	This Chancellor and former pediatric cardiac surgeon, shared insights on the multi-billion dollar transformation of the University of Nebraska Medical Center into one of our country's leading medical academic institutions and largest employers in our state.
Don Goldstein	A proud son shared the story of how his mother helped over 200 Russian refugees relocate to Omaha over a 20-year period then funded an endowed chair at the University promoting human rights. This humble family has created a multi-generation tradition of effective giving in our community.
Jeff Gordman	This young CEO took a family business from bankruptcy to a national success story. He shared his personal views on knowing when you've accumulated enough wealth for personal financial security, determining how much is enough for children, and how to effectively leave a charitable legacy for the community.
John Gottschalk	A lifelong business leader, this former CEO showed what is possible when dynamic individuals give not only money but leadership to charitable endeavors. By restoring a baseball field from his childhood, he helped invigorate and empower an entire rural community to begin to dream again of what might be possible.
Barbara Greenspan	This daughter of Holocaust survivors, noted author, and respected educator has devoted her life to helping others discover their legacies while founding a nonprofit organization that has empowered over 10,000 youth in Philadelphia and South America to become leaders in public service and engaged citizens.
Deryl Hamann	An estate planning attorney turned business owner walked us through his life story from one-room schoolhouse to CEO of a major bank. He then sold his business and established a family office and foundation leaving a legacy to both his family and community.
Kim Hawkins	As leader of this 70-year-old, third generation construction company, he confronted the challenges of succession in a multi-family business then hired a family office consultant to assist his family in preserving their assets and giving back to the community that supported his business and family.

Speaker	Topic
Scott Hazelrigg	Driven to positively change young men's lives through programming in education, physical activity, self-discipline and leadership, this tireless foundation leader has built an all-boys after-school program in North Omaha that is altering the trajectory of a community, one boy at a time.
Aaron Hilkemann	Applying the lessons learned from leading thousands of employees during his tenure at Duncan Aviation, this CEO helped develop an innovative training program for non-profit executives, enabling them to efficiently scale their organizations to meet the needs of their constituencies.
Paul Hogan	The world's largest home health care franchiser shared how they are helping the elderly age with dignity around the globe. He also discussed the challenges and opportunities of raising their children in affluence and using philanthropy as a means of passing on personal values
Dana Holt	This tax attorney discussed the features and benefits of non-cash gifts to nonprofits such as: closely held stock, art, personal property, mineral rights, real estate, annuities, agricultural commodities, and oil and gas rights, followed by a panel discussion of practical, local examples of such gifts.
Russell James	This university professor, arguably the leading expert in the country on "charitable bequests," shared his insights on both the demographics and motivations of donors who include charitable bequests in their estate plans.
Todd Johnson	With an incredibly successful business consortium, acrimonious sibling relationships and millions of dollars of legal fees incurred as the result of a failed estate plan behind him, this survivor shared the tragedy that can occur when heirs are unprepared to handle substantial wealth. Learning from mistakes made, he now has become a major philanthropist and proponent of limited inheritances and open, honest communication with children around money and personal achievement.

Speaker	Topic
Fred Kauffman	This trial attorney detailed the intrigue surrounding one of the largest charitable bequests ever to a university. The case read like a novel including undue influence, mental capacity, and testamentary intent. Many lessons were learned on steps to take (and not to take) when contemplating making large charitable bequests.
Steve Kenney & Alex Wolf	Charitable Remainder Trusts and Charitable Lead Trusts, as tax-effective planning strategies, sprang to life with stories of real-life cases by these experienced and respected tax advisors.
Bill Kernen	This former corporate executive shared his story of how he has prepared his adult children to eventually receive a significant inheritance and to distribute money effectively to charitable causes that reflect his and his wife's values.
Gene Klein	By coordinating law enforcement, judges, school systems, health care and mental health care professionals on a single integrated campus, this non-profit CEO has made Project Harmony a national model for child advocacy providing services to our most vulnerable children.
Dan Kline	This experienced CAP graduate, a certified financial planner, taught students how annuities, life insurance, deferred compensation, and qualified retirement plans can be most effectively utilized in a tax-efficient manner to achieve their clients' charitable objectives.
Jeff Kutash, John Scott, & Kristin Williams	This panel of executive directors who oversee foundation assets in excess of $1 billion shared the challenges of determining worthy recipients, staying true to the founders' intentions, and the challenges of giving money away wisely.
Diny Landen	A savvy business woman and community volunteer shared how her family has held structured family meetings over a decade where grandchildren learn family values, fundamentals of the family business, and the joy of sharing with those less fortunate.
Jim Landen & Mary Heng-Braun	The CEO of a large, third generation family-owned business, along with the family's advisor on this effort, Mary, disclosed the inner workings of the foundation his parents established to work with their grandchildren to teach good citizenship and leadership skills.

Speaker	Topic
Mike & Susan Lebens	These childhood sweethearts each launched successful careers: one as corporate legal counsel and the other as one of the first employees of national energy company. Today the power couple has "retired" and are parlaying their wealth and leadership skills into burgeoning philanthropists.
Hali Lee	This New York based consultant shared the results of her published national two-year study of charitable giving by people of color. An interesting picture unfolded, providing insight into the future of giving in America as people of color and immigrants play an increasingly important role in American philanthropy.
John Levy & John Scott	John Scott, president of a local private foundation, humbly shared the story of how his father, Warren Buffett's first fulltime employee, amassed a great fortune in Berkshire stock and is intentionally giving it all away in the next few decades in the Omaha community. John Levy, JD, holds over 1,000 meetings per year with nonprofits to conduct due diligence and to assure the Foundation's grants are being spent wisely. These two are wonderful examples of good stewardship and the effort required to give money away wisely, while staying true to the donors' intentions.
Rodrigo Lopez	Born in South America, the speaker parlayed a foreign study experience into building and selling a highly successful business, to chairman of the national Mortgage Bankers Association. He and his wife have become civic leaders and champions of several significant charitable causes.
Dianne Lozier	This power couple oversees their private foundation of $400,000,000 with a focus on social service and social justice issues. Unsatisfied with inner-city education of at-risk children, they have started an experimental school requiring uniforms, parental participation, and learning fundamentals in reading and math. Through their gift of funding, leadership, and hard work, they hope to change the tide of economic inequality in the community.
Tracy Madden-McMahon & C.K. Duryea	The CEO of a large hospital foundation and a veteran director of planned giving shared their insights on the fundraising responsibilities of nonprofit boards; and cultivating and soliciting major and planned gifts.

Speaker	Topic
Carl Mammel	Nationally recognized as a pioneer in his industry, this modest entrepreneur shared his evolution from amassing great wealth to quietly distributing it in his community.
Mike McCarthy	A firm believer in transparency, this highly successful investment banker annually meets one-on-one with each of his adult children to share changes in net worth and disclose details of his estate plan. Each child knows what they will receive, why, and their parents expectations; as well as what their parents will leave to the community.
Frank McGree	The CEO of this nonprofit shared how government cutbacks in funding have caused his organization to establish a planned giving function to make up the shortfall, and the challenges of the transition.
Sue Morris	The executive director of one of the most unique organizations of powerful philanthropists in America provided insight into the inner workings of this high-engagement group of community leaders who over 25 years have contributed more than half-a-billion dollars for public-use buildings, transforming a community in the process.
John P. Nelson	An indefatigable volunteer, the former CEO of a third generation employee-owned business, shared the rewards that come from community volunteerism. Through serving in leadership roles of multiple nonprofits, one can positively impact the quality of life in the community and develop strong personal friendships with like-minded individuals while creating favorable exposure for your business.
George Nicholas, III	From humble beginnings in the Jim Crow south, to the executive suite of one of America's largest corporations, to the presidency of a college; he and his wife have become enthusiastic philanthropists providing scholarships for minority students who are the first in their families to attend college.

Speaker	Topic
Tom Pansing	With years of representing nonprofits, this attorney discussed how to draft effective gift acceptance policies to clearly spell out the intentions of both donor and nonprofit to avoid any future misunderstandings.
Ken Patry & Jeff Snyder	These tax consultants revealed how to get maximum tax benefits by structuring significant gifts in accordance with the intricate requirements of the tax code.
Ron Quinn	A humble, private philanthropist himself, this executive discussed his feelings on giving anonymously, the advantage of focusing on a few organizations you are passionate about, and creating strong personal relationships with development professionals.
Bruce Rasmussen	This veteran, former college athletic director shared the critical role fundraising plays in collegiate athletics as well as the challenges and opportunities presented by the new "NIL" (Name, Image, and Likeness) landscape in Division I athletics.
Kirby Rosplock	This West Palm Beach, Florida family consultant authored The Complete Handbook of Family Offices and developed an innovative online learning tool for beneficiaries to gain competency in financial stewardship. An heiress herself, she can empathize with the generations that follow the wealth creator and help them use their inheritance and influence to become meaningful contributors to society.
Jim Ricketts	The CEO of a private foundation described how a billionaire transitioned from a "traditional" philanthropist to an "entrepreneurial" philanthropist and is making a profound difference on his terms.
Steve Scholer	This veteran development officer provided insights into the nurturing of multi-million dollar planned gifts and how he helped the donors and the institution meet their needs.
Steve Scholer, C.K. Duryea, & Steve Hill	Representing the two major universities in the state and a nonprofit with worldwide reach, these three Planned Giving professionals looked into the future to see a more donor-focused, personalized approach to gift planning emerging.

Speaker	Topic
John Scott	The executive director of a family foundation shared his family's philosophy of maintaining their foundation indefinitely versus terminating it after a pre-determined number of years, limiting recipient organizations to a set list, and the challenges of budgeting with an asset base that has significant volatility.
Walter Scott, Jr.	Omaha's preeminent philanthropist talked about the importance of collaboration on large community projects, how to learn from our mistakes, and the importance of investing in our youth. He shared how – through his passion and leadership – he transformed a small- time zoo into Nebraska's top tourist attraction earning it the title of "Top Zoo in the World."
Calvin Sisson	In September 2021 billionaire businessman and philanthropist, Walter Scott, died leaving his vast estate to his charitable foundation. Calvin Sisson, the foundation's president and CEO, described the vision, mission and values of Nebraska's largest foundation; and the challenge and opportunity to continue Walter's transformational impact on the community.
Michael Staenberg	Having built a nationally recognized real estate business with clients that include Walmart, Lowes, McDonalds and Taco Bell, this entrepreneur began channeling his energy into being an indefatigable philanthropist. In giving away over $100 million to charitable causes, Michael utilizes a hands-on leadership style to each project he chooses to fund. He believes in leading by example, always trying to inspire others to join him in giving.
Todd Simon	Co-owner of a fifth generation family business employing thousands of people throughout the country, this marketing guru described the concept of "cause marketing" – supporting organizations that align with their brand and that benefit their employee population.
Ken Stinson	Starting as a college intern, this young engineer spent over 45 years with one of the largest construction/mining companies in the world, eventually serving as CEO and Chairman. He has combined his ability to manage complex projects, personal charisma, financial resources, and humility to champion several nonprofit building projects that have changed the face of our community.

Speaker	Topic
Pam Swisher	The executive director of a large, multi-million dollar foundation shared the joys, challenges and opportunities of helping the donor's heirs distribute the foundation's assets meaningfully while staying true to the intentions of the original donors.
L.B. "Red" Thomas	A former CFO of a Fortune 100 company, this executive has used his knowledge and insight to develop an extremely thoughtful giving plan through the use of a donor advised fund. He leverages his giving through matching strategies and rewarding volunteers who are willing to make a difference.
Pete Tulipana	This long-time foundation executive director provided insights to the administration of nonprofits and the responsibilities of nonprofit boards.
Karen VanDyke	While on a ministry trip to Uganda, Karen, a wife, and mother of five small children felt an intense calling to help educate the impoverished children of this African nation. After nearly 15 years of ceaseless effort, Karen's nonprofit has raised millions of dollars and helped hundreds of children earn an education while giving them hope. Karen's story reinforces the truth that one, dedicated, focused, individual can in fact, change the world.
Lynn Wallin Ziegenbein	The former executive director of arguably Omaha's most influential private foundation expounded on lessons she learned over her 30-plus year career, then shed light on current projects that could be transformational for the Omaha community.
John A. Warnick	Nationally recognized as an estate planning attorney, author, and founder of the Purposeful Planning Institute, John is transforming estate planning in America from a transactional to a generative process.
Wally Weitz	Having grown from a one-man shop to a manager of over $5 billion in assets, this laid-back entrepreneur shared how he and his family are growing as major philanthropists and learning as they go.

Speaker	Topic
Gail Werner-Robertson	The daughter of parents who epitomized “rags-to-riches” by creating one of the largest trucking companies in North America, shared the challenges and responsibilities of managing great wealth. As an attorney and wealth manager, she built a highly functioning family office to administer every aspect of the family’s fortune and philanthropy.
Doug Wilwerding	Committed to teaching his three daughters to be responsible stewards of the wealth they will inherit, this patriarch learned to adapt by switching to advisors more closely aligned with his daughters’ gender and age. By actively engaging them in important decisions, the future heirs have earned their parents' respect and confidence to maturely handle money.
Mike Yanney	This internationally-recognized business executive shared his passion for mentorship and how leadership can be every bit as important as money in effective philanthropy.

Past Participant Testimonials

"I have found that most people are charitable and would be more so if they know how to effectively support nonprofit organizations without jeopardizing their own security. CAP® has given us the skills to help people explore these ideas and find solutions that cement their own legacies through greater support of the organizations dear to their heart."

Jason Hiley, Hiley Hunt Wealth Management

"My CAP® experience has been extremely rewarding for me. I highly recommend this class for anyone working in the estate or charitable planning fields!"

Stacie Neussendorfer, Foster Group

"The interaction of the group and sharing of different perspectives gave me a different perspective on the whole topic. Learning about the nonprofit sector and that thought process was terrific and opened my eyes."

Larry D. Tennison

"While it was tough at times to find the time and motivation to do the coursework, I found the material to be stimulating and am happy I went through the program. I've already put a good amount of the teachings to use in my practice."

Brandon Hamm, Koley Jessen LLP

"The CAP® program is exactly the type of thing we need to build a philanthropic community. The materials were good and I developed some great relationships!"

Jesse Sitz, Baird Holm

"Outstanding! Opportunity of a lifetime to hear the personal stories of some of America's wealthiest individuals!"

Leonard Sommer, Hancock & Dana

"The CAP® course has been the most rewarding accomplishment of my professional career. All the time and effort I put into it was worth it and I will never forget the entire CAP® experience. I am anxious to take this information and help others to make their legacy a reality."

Jeremy Belsky, Boys Town

"CAP® has been a great opportunity to see philanthropy in a new way and connect with other professionals. It is an important investment in our community that will be felt for decades to come. I am grateful for the experience."

Tracey Madden-McMahon, Methodist Hospital Foundation

"The vision for the Omaha CAP® program, format and approach has been a remarkable undertaking. This program will measurably increase the level of service that the various planning professions bring to their clients as well as increase the culture and impact of philanthropy in Omaha."

Nick Taylor, Fitzgerald, Schorr, Barmettler & Brennan, PC, LLO

"Totally changed my outlook on philanthropy. Now I run across charitable situations all the time!"

David Wilson, Walentine O'Toole

"I have a college degree, an MBA, and the CFP designation, but the CAP® study group program has been the most rewarding educational experience I have ever participated in!"

Dale Christenson, UBS Financial Services

"This has been the most exhilarating study/testing I have ever had. Thank you for making it such an awesome experience!"

Ralph Dovali, McMillen Dovali Co.

"The CAP program has been extremely gratifying, both personally and professionally. CAP has given me new ways to think about family wealth, non-profits, and the importance of thinking more holistically about the intersection between the two. I looked forward to the course materials and the connections with like-minded people excited to make Omaha an even more philanthropic city."

Andrea Marshall, Andrea Marshall Consulting

"I loved everything about my CAP experience, including the materials, the discussions, and the friendships formed. The knowledge I gained will help me not only in my personal planning but particularly as I consult with our customers as they contemplate the disposition of their estates after selling their businesses."

Kris Karnes, First National Bank of Omaha

Omaha Community Foundation

CHARTERED ADVISOR IN PHILANTHROPY®

Indication of Interest

CAP® OVERVIEW

The Omaha Community Foundation helps facilitate study groups for professional advisors to earn the Chartered Advisor in Philanthropy (CAP®) designation. This designation signifies that the student has successfully passed exams for the following three graduate-level courses:

- GS839: Planning for Philanthropic Impact in the Context of Family Wealth
- GS849: Charitable Giving Strategies
- GS859: Gift Planning in a Nonprofit Context

STUDY GROUP

The study group meets a total of 15 times over an eight-month period with each class lasting two hours (3:30-5:30 pm). Students must commit to attending a minimum of 60% of all the classes. Most students indicate they study about three to four hours in preparation for every one hour spent in the classroom.

Class size is limited to facilitate lively interaction among participants. Participants are selected based on their area of expertise and the experiences they bring to the group.

TUITION

The tuition cost for all three courses is about $4,495 ($3,695 for nonprofit participants). Limited scholarships are available based on financial need.

CONTINUING EDUCATION

Attendance is taken at every class and all three exams are completed at a nationally recognized professional testing center. The Omaha CAP® Study Group Program has been approved for continuing education credit in past years and may be approved for credit in future years.

YOUR PARTICIPATION

Having read and understood the time and financial commitment indicated above, if you would like to be considered for participation in future CAP® classes, please complete the following form. You can also scan the QR Code below. Thank you for your consideration.

CAP® Indication of Interest Form