



The Catholic Foundation  
of Central Florida

Rollins  
EST. 1885



WEALTH ADVISORS



# CENTRAL FLORIDA CAP STUDY GROUP INTENT FORM

Doing More Together For Our Community Through Philanthropy

## CAP® OVERVIEW

The Catholic Foundation, F4 Wealth Advisors and ShuffieldLowman, with the support of Edyth Bush Charitable Foundation, are collaborating to do more in our community through philanthropy. We are co-hosting study groups designed to bring together client-facing advisors and non-profit executives to earn the Chartered in Philanthropy (CAP®) designation provided by The American College of Financial Services. This designation signifies that the student has successfully passed exams for the three graduate-level courses:

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

## STUDY GROUP

The study group will engage multi-sector professionals who support members of our community with decisions for charitable giving. There are 9 meetings with a graduation event over a nine-month period. Participants must commit to attending a minimum of 60% of the sessions. 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 interactions among participants. Participants are selected based on their area of expertise and the experience they bring to the study group. These sessions will enhance learning specifically about our region and our donors with an exchange of ideas and opportunities to meet donors and expert speakers.



THE  
AMERICAN  
COLLEGE  
OF FINANCIAL SERVICES®



EDYTH BUSH  
CHARITABLE FOUNDATION

**Registration Deadline: August 2024**  
**Study Group Begins: September 2024**

# TUITION

The CAP® program, offered by The American College of Financial Services, is a difference-maker for careers at financial services firms, legal firms and non-profit organizations. Tuition cost for all three courses is \$4,495 and \$3,695 for nonprofits.

Professionals with their CAP® designations will help their clients and donors achieve their philanthropic aspirations and determine the success of our Central Florida community for generations to come.

# YOUR PARTICIPATION

You may have been referred to us by a previous CAP® graduate, or you may have inquired about the program on your own. We would like to invite you to join the CENTRAL FLORIDA CAP® STUDY GROUP. Having read and understood the time frame and financial commitment indicated above, if you are interested now or would like to be considered for participation in future CAP® Study Groups, please complete the form and mail it to Central Florida CAP® Study Group, PO Box 4905, Orlando, FL 32802. Thank you for your consideration.

☐ YES, I AM INTERESTED IN BEING CONSIDERED FOR THE CENTRAL FLORIDA CAP® STUDY GROUP.

NAME \_\_\_\_\_

EMPLOYER \_\_\_\_\_

BUSINESS PHONE \_\_\_\_\_

BUSINESS EMAIL \_\_\_\_\_

PROFESSION:

☐ LEGAL

☐ FINANCIAL SERVICE

☐ ACCOUNTING

☐ NONPROFIT

☐ OTHER

DEGREES/PROFESSIONAL DESIGNATIONS

YEARS OF EXPERIENCE IN YOUR CURRENT PROFESSION \_\_\_\_\_

REFERENCE (please indicate any current CAP® student or CAP® graduate you know)

☐ NO, I AM NOT INTERESTED AT THIS TIME BUT WOULD LIKE TO BE NOTIFIED ABOUT THE NEXT CAP® STUDY GROUP

SIGNED \_\_\_\_\_

DATE \_\_\_\_\_

## FOR MORE INFORMATION:

Kimberlee Riley, CAP®, President & CEO  
[kriley@cfocf.org](mailto:kriley@cfocf.org) or 407-341-6298

Darrell DeVaney CFP, CAP®, Founder  
[darrell@f4wealthadvisors.com](mailto:darrell@f4wealthadvisors.com)

Greg Meier, JD, CAP®, Partner  
[gmeier@shuffieldlowman.com](mailto:gmeier@shuffieldlowman.com)

Steve Jerina, CAP®, Partner  
[sjerina@rollins.edu](mailto:sjerina@rollins.edu)

VISIT: [www.CAPStudyGroup.org](http://www.CAPStudyGroup.org)



THE  
**AMERICAN  
COLLEGE**  
OF FINANCIAL SERVICES®



EDYTH BUSH  
CHARITABLE FOUNDATION



The Catholic Foundation  
of Central Florida

Rollins  
EST. 1885



WEALTH ADVISORS

SHUFFIELD  
LOWMAN  
ATTORNEYS AND ADVISORS