

CENTRAL FLORIDA CAP STUDY GROUP INTENT FORM

Doing More Together For Our Community Through Philanthropy

CAP® OVERVIEW

The Catholic Foundation, 55 North Private Wealth, Rollins College, 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:

- CAP 539: Planning for Philanthropic Impact in the Context of Family Wealth
- CAP 549: Charitable Giving Strategies
- CAP 559: 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 80% 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.

Registration Deadline: August 2025
Study Group Begins: September 2025



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 email it to Central Florida CAP® Study Group - mweed@cfocf.org. Thank you for your consideration.

FOR MORE INFORMATION:

Madelyn Weed, CFRE, CAP®, President & CEO
mweed@cfocf.org or 407-246-7188

Darrell DeVaney, CFP, CAP®, Founder
Darrell@55NorthPrivateWealth.com

Greg Meier, JD, CAP®, Partner
gmeier@shuffieldlowman.com

Steve Jerina, MPA, CAP®, Director of Development
sjerina@rollins.edu

VISIT: www.CAPStudyGroup.org



The Catholic Foundation
of Central Florida

Rollins
EST. 1885



55 NORTH
PRIVATE WEALTH

**SHUFFIELD
LOWMAN**
ATTORNEYS AND ADVISORS

☐ **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 _____



THE
**AMERICAN
COLLEGE**
OF FINANCIAL SERVICES®



EDYTH BUSH
CHARITABLE FOUNDATION