



The CAP® is an online, self-study program, which allows you to move through the program at your own pace. Course materials include:

- Recorded lectures, with inset videos
- Self-tests
- A sample exam
- Readings and textbooks

Throughout your time in the program, you will have online access to The College's expert faculty. Each of the three courses concludes with a two-hour exam, administered at more than 4,000 exam centers around the country.

Requirements

To receive a CAP® designation, you must successfully complete all courses in the program, meet experience requirements and ethics standards, and agree to comply with The American College Code of Ethics and Procedures.

Experience

Three years of full-time relevant business experience is required for the CAP® program. The three-year period must be within the five years preceding the date of the award. Relevant experience may include working in a nonprofit organization, serving on a nonprofit board, or volunteering. An undergraduate or graduate degree from an accredited educational institution qualifies as one year of business experience. Part-time qualifying business experience is credited toward the three-year requirement on an hourly basis, with 2,000 hours representing the equivalent of one-year full-time experience. The following activities meet the required business experience qualifications included in the certification process.

Insurance and health care

- Field underwriting and management, including sales and service activities, supervision and management of persons involved in sales or services, or staff support of persons in these activities.
- Company management and operations in positions involving substantial responsibility.

Financial services and employee benefits

- Client service and related management, including direct contact with clients, supervision and management of persons involved directly in the process of providing financial services or employee benefits, or staff support of persons in these activities.
- Financial institution management and operations in positions involving substantial responsibility.

Other

- University or college teaching of subjects related to the Huebner School curriculum on a full-time basis at an accredited institution of higher education.
- Government regulatory service in a responsible administrative, supervisory, or operational capacity.
- Activities directly or indirectly related to the protection, accumulation, conservation, or distribution of the economic value of human life; these include the work of actuaries, attorneys, CPAs, investment advisers, real estate investment advisers, stockbrokers, trust officers, or persons in other similar occupations.

Required CAP® Courses:

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

The focus of this course is on wealth in families and wealthy families in community with others. By the end of this course, the fundraiser and advisor should have the knowledge needed to elicit client or donor goals for self, family and society and to convene a team to achieve those goals now, later, at death or beyond death, through a financial plan, business exit plan, estate plan, or gift plan.

Charitable Giving Strategies (GS 849)

The focus of this course is on charitable tax strategies, tools, and techniques. By the end of this course, students will have the knowledge needed to open a client-specific or donor-specific conversation about the features and benefits of appropriate charitable tools. The student will then be able to convene a planning team, or in simpler cases, close for the gift.

Gift Planning in a Nonprofit Context (GS 859)

The focus of this course is on gift planning for nonprofits. By the end of this course, students should have the knowledge needed to apply the concepts and processes introduced in GS 839 and GS 849 to develop six to eight figure gifts for a specific nonprofit from its highest capacity donors.