

ELEVATE YOUR EXPERTISE WITH CAP[®]



THE COMMUNITY
FOUNDATION
— FOR NORTHEAST FLORIDA —
Giving Back. Forever Forward.



The Community Foundation for Northeast Florida is leading a Chartered Advisor in Philanthropy[®] Study Group to assist local professionals who wish to pursue their CAP[®] designation.

The Chartered Advisor in Philanthropy[®] (CAP[®]) designation allows professional advisors to elevate their expertise in charitable giving strategies to better serve their clients. The Community Foundation is offering the fourth cohort of CAP[®] Study Group from November 2025 to August 2026 to complement the three fully online courses offered by the American College of Financial Services. The Study Group allows you to:

- Engage in discussion of the course material and prepare for quizzes and tests with colleagues and John Zell, CAP[®], Senior Vice President, Development
- Build your local network of financial and tax advisors
- Learn how working with The Community Foundation can help you to maximize your clients' legacy for lasting impact in the community

Course Information: [CAP[®] Chartered Advisor in Philanthropy[®] Program | The American College of Financial Services](#)

Questions? Please email Mary Pat Wallmeyer, Donor Services Officer, at mpwallmeyer@jaxcf.org.



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Chartered Advisor in Philanthropy® (CAP®)

Study Group Schedule

3:30 - 5:00 p.m.

245 Riverside Drive, Suite 310

Jacksonville, FL 32202

Course Information: [CAP® Chartered Advisor in Philanthropy® Program | The American College of Financial Services](#)

Link To Enroll (3-Course Package): [Enrollment at The College | The American College of Financial Services](#)

GS-839/CAP 539: Planning for Impact in the Context of Family Wealth

Wednesday, November 5, 2025	Assignments 1 & 2
Wednesday, November 19, 2025	Assignments 3 & 4
Wednesday, December 3, 2025	Assignments 5 & 6
Wednesday, December 17, 2025	Assignments 7 & 8
Wednesday, January 7, 2026	Assignments 9 & 10
Wednesday, January 21, 2026	Assignment 11 & Review
Monday, January 26, 2026	Take Exam and Register for GS-849
Monday, February 2, 2026	Receive Materials for GS-849

GS-849/CAP 549: Charitable Giving Strategies

Wednesday, February 18, 2026	Assignments 1 & 2
Wednesday, March 4, 2026	Assignments 3 & 4
Wednesday, March 18, 2026	Assignments 5, & 6
Wednesday, April 1, 2026	Assignments 7 & 8
Wednesday, April 15, 2026	Assignments 9 & 10
Wednesday, April 29, 2026	Assignment 11 & Review
Monday, May 4, 2026	Take Exam and Register for GS-859
Monday, May 18, 2026	Receive Materials for GS-859

GS-859/CAP 559: Gift Planning in the Nonprofit Context

Wednesday, May 27, 2026	Assignments 1 & 2
Wednesday, June 10, 2026	Assignments 3 & 4
Wednesday, June 24, 2026	Assignments 5 & 6
Wednesday, July 8, 2026	Assignments 7 & 8
Wednesday, July 22, 2026	Assignment 9 & Review
Monday, July 27, 2026	Take Exam
Monday, August 3, 2026	Submit Your Designation Application