

MISSION & VISION Fully Invested in What Comes Next

THE MISSION of the AIP Foundation is to encourage and support the professional education of advisors in philanthropy and to increase the public's awareness that such advisors exist.

OUR VISION is one where communities across America are strengthened by increased charitable giving and responsible stewardship of charitable funds

WHAT WE DO We provide assistance in the form of scholarships to individuals who are interested in the field of philanthropy and dedicated to improving their community. We broaden the public's understanding and acceptance of the designation of Chartered Advisor in Philanthropy (CAP) or any other professional designation dedicated to philanthropic advice.

Why the CAP designation?

There are many excellent resources for philanthropic education. We have determined, however, that the coursework in the American College of Financial Services' Chartered Advisor in Philanthropy program is most worthy of our support. The CAP program is unique in that it combines financial, tax, and legal coursework along with instruction on how to collaborate with non-profit executives and other professional advisors. CAP trained professionals are uniquely skilled to help clients through the very important processes of estate, financial, or business transition planning.

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We asked CAPs who requested the "Why Become a CAP" Powerpoint for feedback and about how they are using it. Here are some of the responses:

Kevin Baldwin, CAP – "I have used the slideshow within my own agency to explain CAP to colleagues. As outgoing President of FSP Hartford, we are using the powerpoint for a presentation in June. I am on the board of 4 charitable organizations and plan to use it to show their professionals how, by getting CAP, they will be more effective."

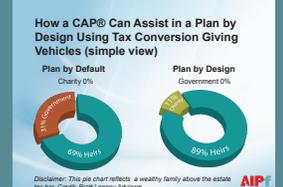
Stephanie Curry, CAP – "In my local Estate Planning Council there are only 2 CAPs. With this powerpoint tool and the online video, I hope we can interest more professionals in CAP"

Adam Kleinfelter, CAP – "I have used the presentation info on a local radio program 'Talking Money' and explained the designation and coursework. I also plan to use it with trusts groups and Community Foundations"

Kate Maitland, CAP – "My plan is to present it to a 'Women in Development' group in NYC. They know little about the CAP program. Also, I can share this with my colleagues in Morgan Stanley."

Jay Weisman, CAP – "I am an independent philanthropic advisor and coach. I have many opportunities to introduce the CAP designation and the benefits of a philanthropic conversation to wealth advisors and estate planners who want to differentiate their practices and deliver more value to their clients."

Les Winston, CAP – "I am working with and sharing this material with local charitable groups in FL."



TO DONATE
Please visit
advisorsinphilanthropy.org/Foundation

Public and Professional Awareness Program: "Why Become a CAP" powerpoint educational tool was unveiled at the 2016 Conference on Philanthropy and made available afterwards to any CAP to help increase awareness about the CAP profession. Your donations will keep this program moving forward with a second powerpoint for the public "How Do I Give More, Give Better and Smarter (with help from a Chartered Advisor in Philanthropy)." A slideshow video with this public message is also planned.

Dear Colleagues and Friends,

2016 was a very productive year!

I first want to acknowledge and thank all of our donors and volunteer board members for making the work of the Foundation possible. A very special thanks to Barry Nickelsberg, CAP, for his outstanding work with our board.

At the AiP Conference in May 2016, I humbly accepted the Fithian Leadership Award. Sometimes you get awards at the end of your career, but I feel like this is just the beginning. I appreciate the acknowledgement from AiP for the work I have done with the Foundation.

In 2016 the Foundation created our first powerpoint presenting the CAP designation to other professionals. We offered the slides at no charge and had a dozen requests from current CAPs. In early 2017 we met with some of those CAPs to review how and where they've used it and how it can be improved.

At its April 2017 meeting, the AiPF board agreed to conduct a feasibility study with regard to becoming a CAP membership organization.

I believe we are on the cusp of a significant change in the world. We have entered the "Era of Humankindness." This "Era of Humankindness" will require our communities to provide the "human caring resources" through viable, efficient charitable entities. This is occurring and will continue to be true as government withdraws, at all levels, from providing for the "social" needs of individuals and families.

Over the past 8 years of the Foundation's history, those serving on the board, and myself, have built a strong base from which the Foundation can steward the "Era of Humankindness". The Foundation continues to be Fully Invested in What Comes Next.

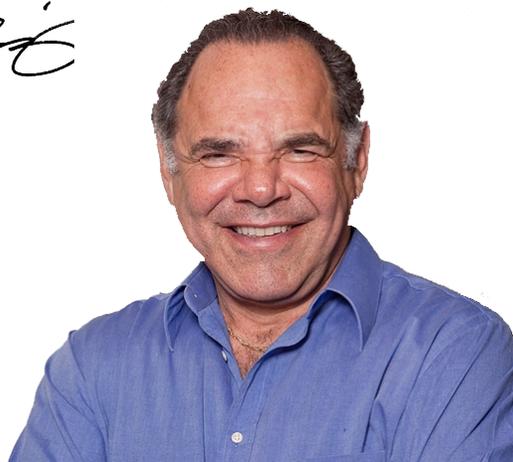
The Foundation greatly appreciates your generous gifts to support our efforts. Any gift you can make to the Foundation will help us carry out our two primary missions:

- to increase the number of professional advisors in philanthropy and
- to inform the public about the profession.

Please take advantage of this opportunity to help and visit www.advisorsinphilanthropy/donations to make a tax-deductible gift to the Foundation.

All the best,

Les Winston, CAP, CPCU, AAI
President

Scholarship Program: 112 scholarships have been awarded since 2010. Here are some fun facts about our scholarship recipients:

- 65 are Female; 48 are Male
- 50 Advisors; 60 Nonprofit Executives including 30 from Community Foundations
- 25 States represented: AL, AZ, CA, CO, CT, FL, IA, IN, KS, KY, LA, MA, MO, NC, NE, NH, NY, OH, PA, SC, TX, UT, VA, WA WI
- 17 have paid it forward and become donors to AiP Foundation

2016 DONOR CIRCLES OF GIVING

PLANNED GIFTS

Frank & Roseanne Mauro Charitable Trust beneficiary to honor Lesley Winston, CAP

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Donors and grantmakers may earmark funding for nonprofit professionals and/or for enhancing philanthropy within their community.