



CAIRN. A man-made mound of stones erected as a memorial or marker often placed at junctions or a noteworthy point.

AiPF RUINED MY CAREER! ...and helped me find my way.



Advisors in Philanthropy
FOUNDATION
Fully invested in what comes next

One year ago I slept soundly each night knowing that I had adequately prepared all the reports necessary for the next day's meetings. Now I lose sleep at night pondering and praying about the right questions to ask a client that will open them up to their purpose and passions.



A year ago, before AiPF offered me a scholarship to earn the Certified Advisor in Philanthropy (CAP) designation, I was enjoying a meal with clients at the nicest restaurant in town. Today I ate at the soup kitchen with a client. Our meal cost less than \$0.45 to prepare. Instead of small talk we discussed the saddest parts of town, the problems... We dreamt of ways to improve our community and made a list of others who might care.

Since my involvement with AiPF, all of my financial planning software stopped working. A year ago I could give a number that would be sufficient for financial security. Today I realize that clients with \$100,000 or clients with millions of dollars won't find security in their finances, which are so uncertain. Instead clients find the most meaning and security in giving assets away! Before I measured success by how many assets I could bring in; this year I took pleasure as assets left our custody and were donated to charity.

On that note, before earning my CAP with AiPF's help, clients only gave cash or wrote checks. Now we talk about assets they didn't even know they had, we talk about resources that they were blind to before. Clients are giving this stuff away too.

I am now dumber for having accepted the AiPF scholarship. A year ago, I was a great competitor and knew most of the things I

needed to. Now I am in way over my head all of the time. I have to find other folks to join me in serving my clients and I feel like I am constantly in need of assistance. Sure clients are better off, but things were so much easier when I knew it all.

The worst part is, a year ago I knew my clients well. I remembered details about them and could fill an hour with fun conversation. Now I realize every day how little I really knew them; how meaningless our small talk was. Clients now share their joy and their pain. They share their disappointments and their passions. Their goals and dreams are no longer measurable like they used to be. A dollar amount was much easier to figure and percentages much easier to calculate than lives and hearts and all this mushy gushy stuff.

My budget for tissues has gone up by a factor of ten. I charged the balance of my program tuition to my Visa and paid my bill off that month. I always feel good paying off my credit card but after taking the AiPF-approved courses, I know I am forever indebted to the folks who gave me that scholarship and encouraged me to become knowledgeable about philanthropy. I will never be able to repay them.

Lastly, I am more impatient, restless and uneasy about my work. Before I had a specific plan. I was going to make enough that I could retire. Now I am certain I will have to work forever! The things I am working on are too important to stop, they are too important not to share, and I don't have enough hours in the day to accomplish it all.

Adam Miller, CFP®, CAP®
2011 Scholarship Recipient,
Advisors in Philanthropy Foundation, Inc.



OUR CORE MISSION & VALUES

I. Who are we?

We are professionals in philanthropy, finance, law, and accounting.

II. Who do we serve?

We serve practitioners from a cross-section of professions, as well as individuals and families who contribute to charity as a means to improve their community and the world.

III. Where do we serve?

We serve across the United States, Canada, and overseas.

IV. What vital, critical, urgent human need do we seek to meet?

We seek to advance the causes of social justice, education, culture, science, and the environment through increased and more effective philanthropy.

V. How, in essence, do we do so?

We do so by facilitating educational opportunities in advanced charitable planning techniques, sound giving practices, and solid charitable due diligence methods for donors, the professionals who advise them, and for charity leaders.

VI. How do we do this differently than other organizations with a similar mission?

First, we link new practitioners in the professions we serve, and individuals new to philanthropy, with existing educational resources. Where such resources are unavailable or underdeveloped, we will design and offer programs and services, either on our own or in collaboration with partners who share our mission and values.

VII. Why is the Foundation deserving of support?

For grantmakers and donors, our work can multiply the financial value and social impact of their charitable investments by supporting us to attract and train professionals, donors and others to:

- i. Uncover/realize the full extent of their financial philanthropic capacity through the use of advanced charitable planning techniques;*
- ii. Become more generous as a result of their increased financial philanthropic capacity; and,*
- iii. Engage in philanthropy – improving their community and the world -- more effectively than they already are through increased knowledge of comprehensive charitable due diligence and smart giving practices.*

Your Gift is Deductible

The Advisors in Philanthropy Foundation, Inc. is an approved 501(c)(3) public service provider. Gifts to the Foundation are deductible to the full extent of the law under Sec. 170(b) of the Internal Revenue Code.

How to Give

Donations are accepted via credit card at AdvisorsInPhilanthropy.org/donations, or by check mailed to AiPF, 95 Rocky Hill, CT 06067. Call (860) 721-7400, #3 for more information.



SCHOLARSHIP AWARDS

During 2011, AiPF awarded 51 scholarships to deserving students.

MANY THANKS TO OUR 2011 DONORS

\$500+

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Joseph Cohen
Drake Zimmerman*
Alan Loss
John Sullivan

\$200-\$499

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*Chartered Advisor in Philanthropy