



Advisors in Philanthropy
FOUNDATION

Fully invested in what comes next

Founded in 2002, the mission of the Foundation is to support philanthropic education by providing scholarships to AiP members pursuing the Chartered Advisor in Philanthropy® (CAP®) designation offered by The American College or other educational programs in philanthropic planning. Scholarships are awarded to encourage more trained and certified advisors in philanthropy.

The Eva Marder Story

by Les Winston, Chairman of the Board, AiP Foundation

Eva Marder was a hard working retail merchant alongside her husband David. For many years, they owned a ladies wear store near Lincoln Road on what is today known as South Beach, Florida. The business was successful and operated until they retired in 1981. Evie's life was thrown into upheaval when David died soon after retirement, and she was left alone to handle everything that had been done by David for all the years they were married.

I met Evie in 2000 through a referral from a client. Evie was 85 at the time and had been managing her own plans and investments. She had recently gone through some medical issues, and she became very anxious about her future.

I began advising Evie and together we reached a plan that would do everything Evie wanted. I spent many delightful hours with this affable, good humored, and generous lady. Evie used to refer to me as the son she never had, and I was happy to be her "most" trusted advisor. Many times, she would thank me for how relieved and calm she felt about her future.

In 2005, I told Evie about the CAP designation I had earned from the American College. Evie said, "what did you need that for, you did all of that for me already". I explained that it took me 20 years to learn by my own experiences, what could now be taught in a three year course. That must have impressed Mrs. Marder because just prior to her passing in 2009 at age 94, Evie made the AiP Foundation the sole beneficiary of the Eva Marder Charitable Remainder Trust for purposes of endowing scholarships for the CAP designation. She said at the time, "I hope this will make more (advisors) like you".

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Our Scholarship Recipients

- Ralph Adamo, Institute for Family Wealth Counseling, Newport Beach, CA
- Richard Bray, Society of St. Vincent dePaul of Seattle, Seattle, WA
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Phil Cubeta, CLU, ChFC, MSFS, CAP, The Sallie B. and William B. Wallace Chair in Philanthropy at The American College...



“For the advisor, I would say there is a third level of planning that some people call discernment, or wisdom. An advisor at that level helps donors and clients define and achieve the kind of life they would like to live and the legacy they would like to leave behind.”

For an advisor, the highest state of the art is to help clients and donors be prudent and inspired in their use of resources, and to achieve fulfillment and impact in their legacy plans. And that takes a set of skills that includes but goes beyond just the financial. CAPs are trained to help clients and donors have the greatest possible positive impact on their own lives, the lives of heirs, and on the nonprofits that the family loves and supports. Through donors and clients, CAPs help make our communities better for us all.

Many organizations would love to have a CAP® on staff, but they just cannot afford the tuition. Through these CAP® Scholarships, your donors can help raise the tempo and effectiveness of philanthropy in their community. A scholarship in this area may well be the most highly leveraged gift a donor can make.”

You can help us accomplish this important goal:

- Make a personal gift for a single \$500 scholarship
- Encourage contributions by suggesting grants of \$10,000
- Nominate individuals for scholarships

Scholarships can only be awarded as funding is secured. Please help us raise the public’s awareness of advisors in philanthropic planning

Financial Report (as of March 31, 2011)

Assets		\$29,854.78
Restricted for CAP scholarships:	\$25,648.00	
Restricted for Women scholarships:	2,000.00	
Budgeted Expenses:		
Administration	\$ 2,500.00	
Insurance	1,550.00	
AiP Conference Sponsor	3,000.00	

Your Gift is Deductible

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