How CAP® Is Making a Difference in West Palm Beach

In 2011, three visionaries pooled their talents and energy to create a plan that would empower donors and raise philanthropic awareness in the West Palm Beach community. Margaret May Damen, Lori Denison, and Richard Flah would ultimately mobilize a highly regarded diverse group of trust and estate attorneys, financial advisors, life insurance professionals, and nonprofit leaders who shared their vision.

The CAP® program provided the heart and knowledge they needed to form the basis of the first West Palm Beach CAP® study group through which they would share their diverse experiences and perspectives on philanthropy. The CAP*s that emerged a year later, empowered by their knowledge gained in the study group, ignited a movement to advance philanthropy by forming “Advisors for Philanthropic Impact” (API), a nonprofit entity focused on bringing their ideals to fruition.

API has successfully multiplied this network of trusted advisors by facilitating ongoing CAP® study groups year after year with impressive results. With a focus on youth, they are inspiring a new generation of passionate philanthropists bringing fresh ideas for the betterment of the community. In this issue we highlight their efforts and the electrifying results.

Student Finalists Take Home More Than $100,000 at Palm Beach Philanthropy Tank

An exciting new challenge has offered middle and high school students an opportunity to create and implement innovative solutions that will directly impact community issues and social problems in Palm Beach County, Florida. Patterned after the popular TV show, Shark Tank, the Palm Beach Philanthropy Tank has sparked the imagination of young philanthropists in the area who were invited to submit their ideas describing projects that apply the criteria of community impact, program feasibility, solution creativity, sustainability and team strength.

The initiative was led by API and is the brainchild of members Evan C. Deoul, CAP® and Michael L. Kohner, CAP®, Managing Director of Andersen Tax and also President of API. “Mike and I were trying to figure out what our next initiative in youth philanthropy should be and we are both fans of the show Shark Tank, know it kind of has a great cultural buzz to it, and thought [adapting] it would be a chance to make it local, relevant, impactful and fun for students in our area,” explained Mr. Deoul, Senior Managing Director of AB Bernstein. “API came from CAP® and was the foundation that allowed us to do this. Through Main Street Philanthropy and Philanthropy Tank, I think we are making some
pretty big impact….It all started really from CAP®.

Evan and Michael co-chaired the event and went to work reaching out to four area VIPs (Very Important Philanthropists) who enthusiastically agreed to commit $25,000 each. “It has been a privilege to work with the four philanthropists who are generous with both their time and financial means, [and] the talented CAP®s and future CAP®s who have comprised the five API study groups joining together for this endeavor,” said Mr. Kohner.

10 sponsors were obtained who generously gave $10,000 each to help get the plan off the ground.

In collaboration with the Community Foundation for Palm Beach and Martin Counties, and Education Foundation of Palm Beach County, an extensive public relations campaign went out to the community in an effort to reach every school, service organization, club and those who are home-schooled. A phone campaign, press coverage, social media and a YouTube tutorial helped spread the word.

From 37 submissions, nine creative initiatives were selected in January to advance to the final round of Palm Beach Philanthropy Tank. Some of the social issues addressed by the finalists included animal care, hospitalized children, elder care, homelessness, education for underprivileged students, education for emotionally and/or physically challenged youth, and public health. “We were delighted with the quantity and quality of the students’ submissions,” observed Mr. Deoul. “All of the ideas were innovative, and most reflected out-of-the-box thinking which made the job harder to narrow it down to the nine finalists.”

Dedicated volunteers from Philanthropy Tank created a Mentor Handbook and provided coaching to the finalists, training them in presentation skills and providing feedback to perfect their “pitch” to the VIPs, William Meyer, Julie Fisher Cummings and Danielle H. Moore of Palm Beach, and Eric Becker of Jupiter.

On March 17, 2016 an enthusiastic crowd of approximately

Main Street Philanthropy Promotes Charitable Giving in Schools

“What is your passion?” This is the question put forward by the dynamic hands-on program Main Street Philanthropy, designed to challenge teens and young adults as they explore the real world of charitable giving and fundraising. With a focus on collaboration, it brings together small teams of students, their classroom teacher, an ambassador from Main Street Philanthropy, generous donors, and front-line charities, to the benefit of all.

Founded by Ryan Ponsford and Scott Farnsworth, “Main Street Philanthropy,” as they say on their website, “inspires future generations to become passionate philanthropists. We lead small teams of students and their classroom teacher through a truly transformational experience that builds new philanthropic leaders for tomorrow.”

In West Palm Beach, Advisors in Philanthropic Impact (API), a non-profit entity created by West Palm CAP®s, brought their unique skills to Main Street Philanthropy by volunteering to teach the program in schools and mentor students. Those students learn to identify and screen qualified community organizations, raise funds and implement a process for donations. Through the 10-week program students not only develop awareness of charitable needs and the impact they can make, but the team-building experience provides life lessons about group dynamics, decision-making, and the combined strength they possess when working toward a common good.

“It’s a great program and I would encourage CAP®s to explore it if they want to build a brand that inspires multi-generational philanthropy from the bottom up,” says Lori Denison, CAP® of Life Blueprints, LLC and also an API facilitator for the program. “What parent or grandparent doesn’t beam with pride and lend support when their children or grandchildren set and achieve goals that are selfless and focused on helping others?”

If you are interested in bringing Main Street Philanthropy to your town, you can learn more here: http://mainstreetphilanthropy.org/
300 attended the inaugural Palm Beach Philanthropy Tank event at the Harriet Himmel Theater in West Palm Beach. More than $100,000 in prize money was awarded to the finalists to implement their programs over the next year. The students that received funding will now work closely with their investor – or in some cases, as a result of their enthusiasm, multiple investors – to develop a business plan and strategy for success.

“The audience was wild in enthusiasm, and many expressed visible emotional support for these kids trying to solve heart-rending issues. We are very excited to follow their progress over the next several months as they make their ideas come to life,” according to Mr. Kohner.

**Very Important Philanthropists (VIPs), student presenters, emcee Sally Lou Loveman**

Sally Lou Loveman was the evening’s emcee and kept the energy upbeat throughout the night. Loveman is the former audience producer for The Oprah Winfrey Show and Oprah’s Lifeclass for OWN. The finalists also enjoyed a special guest appearance from Martin Hill, who was featured on this season’s Shark Tank program and received funding from shark Lori Greiner and guest shark Ashton Kutcher.

It appears highly likely that they will be working on a sequel, and that they will attempt to do another version in neighboring communities where they will lead or mentor. “I’m proud to be a member of the West Palm community,” adds Mr. Deoul, “proud of what we’re doing. It’s tangible [and] has tremendous good will and halo effect.”

“The inaugural Palm Beach Philanthropy Tank has been an enormously rewarding experience,” agrees Mr. Kohner.

For more information and to follow the finalists’ journeys, visit [http://www.advisors4impact.org](http://www.advisors4impact.org) and follow on Twitter @PBPTank and Facebook [http://www.facebook.com/PBPhilanthropyTank](http://www.facebook.com/PBPhilanthropyTank).
Conference on Philanthropy 2016

May 9-11 | Loews Chicago O’Hare

AiP’s Conference on Philanthropy offers a wide variety of valuable educational content and inspirational speakers revolving around philanthropic planning. You won’t want to miss this opportunity to catch up with your friends and colleagues from around the world and make new business contacts with professionals who share your passion for philanthropy. The conference schedule will allow plenty of time to network and share ideas in a relaxed social setting.

Be sure to catch Wednesday’s Mid-Morning Keynote which will feature The American College’s Phil Cubeta, MSFS, CLU®, ChFC®, CAP® and David Holaday, CFP®, CAP® as they engage the audience in an interactive discussion of the Riley Case and collaborating with financial advisors for gifts of noncash assets.

As an added incentive, many sessions will offer CE credit for CFP®, IMCA and PACE (CAP®). So re-energize and gain valuable knowledge by experiencing the exciting and timely topics that this year’s conference will address. And don’t miss the surprise entertainment at Monday’s Opening Session!

To register for the conference and view the entire line-up, click on the link below:

http://www.advisorsinphilanthropy.org

Help Us Stay Current

Have you moved or changed jobs recently? Help keep us up-to-date by letting us know your new contact information so you won’t miss important reminders and notifications from the College.

Please call Elaine Gulezian at 610-526-1479 to update your information, or go online to your student account on The American College website to make changes to your contact information.

Omaha CAP® Study Group Graduation

The newest Omaha CAP® Study group honored their graduates with a ceremony on February 10, 2016. They were joined by Bob Johnson, President and CEO of The American College, who was in attendance for the festivities. The study group classes ran from May through December of 2015.

Current Study Groups

- Alabama 2016
- Arizona 2015-2016
- Baton Rouge 2015-2016
- Columbus 2015-2016
- DesMoines Area 2016
- Greater Tacoma 2016
- National CAP Study Group 2 2016
- National Capital Region 2016
- New Orleans 2016
- Northeast Alabama 2016
- Omaha 2015-2016
- Planning with Purpose 2016
- Sacramento 2016
- St. Paul, MN 2015-2016
- Washington DC 2015-2016
- West Palm Beach 2016
Congratulations to our New CAP® Designees
January, February, and March 2016

Harry Loy Anderson, CAP® FL
David J. Askew, MSFS, ChFC®, CLU®, CAP® CA
Jason Bird, CAP® NY
Jeffery Byars, CAP® OH
Meredith Camp, CAP® TX
Dale E. Christenson, CAP® NE
Brandon Collins, CAP® TX
Lisa S. Courtice, CAP® OH
Christopher W. Courtright, LUTCF, CAP® MI
Heather Lynn Davis, CLU®, ChFC®, CAP® TX
James W. Dooley, CLU®, ChFC®, CASL®, CAP® NY
Jonathan Elefant, CAP® MD
Lori Evers, CAP® GA
Tammy M. Ferrell, CAP® FL
John B. Floyd, CAP® GA
Ashley A. Frank, CAP® WI
Michele Fugiel Gartner, CAP® UK
Ralph Edward Gillentine, ChFC®, CAP® TN
Linsey A. Gleason, CAP® MI
Stacey R. Goodman, CAP® NE
Mary Bridget Miller Handke, CAP® MN
Corrie A. Haux, LUTCF, CLU®, ChFC®, CASL®, CLF®, CAP® MN
Jason Eric Heller, MSFS, CAP® FL
Lisa Anne Johnson, CAP® MN
David W. Jones, CAP® FL
Nancy L. Koerner, CAP® OH
Barrett Coker Krise, CAP® GA
Geoffrey S. Kunkler, CAP® OH
David G. Leland, CAP® MA
Mark Todd Loeber, CAP® OK
Lisa A. Main, CLU®, ChFC®, CAP® GA
Lauren T. Martin, CAP® TX
Beverly J. McLain, CAP® FL
Greg M. McPherson, CLU®, ChFC®, CASL®, RICP®, CAP® PA
Steven D. Meier, MSFS, CLU®, ChFC®, LUTCF, CAP® OH
Stephen Y. Mohyla, ChFC®, CAP® VA
Lynette Michelle Moore, CAP® PA
Stacie A. Neussendorfer, CAP® NE
Erich Lars Olson, RICP®, ChFC®, CAP® SD
Thomas A. Orchard, CAP® OH
Angela Gugle Parsons, CAP® OH
Michael Anthony Ricci, CAP® MN
G. Shawn Sentz, CLU®, ChFC®, CAP® OH
Shaun M. Shira, CAP® MI
Todd Wayne Simpson, CAP® MI
Jesse D. Sitz, CAP® NE
Robert J. Skrydlak, CAP® NE
Leonard M. Sommer, CAP® NE
Robert B. Wellendorf, CLU®, CAP® NE
David P. Wilson, CAP® NE
Marion Takaaki Yongue, CAP® FL
Johngerlyn Anitra Young, CAP® MI
Marilyn W. Zack, CAP® MI
Origin of the CAP® Pin

The pin of the CAP® designation possesses a special significance. The hand holding a heart can be traced back to the father of Sallie B. Wallace, who together with her husband William B. Wallace, endowed the Wallace Chair in Philanthropy at The American College to support the CAP® curriculum.

Sally’s father was a successful business executive who became a silversmith to make heirloom gifts for family and friends. He stamped each gift with his hallmark, the hand holding a heart. This was adopted to represent CAP®.

The symbol of CAP® stands for craftsmanship and love, and that similarly a gift plan is a well-crafted labor of love. Each plan creates a way that a family, similar to the Wallace’s, passes on a legacy of care and concern not only to family but also to the greater community. A CAP® demonstrates that giving people truly leave their mark on the world.

Join Us on LinkedIn

The CAP® Program has an active linked-in group for you to share ideas with your peers from across the disciplines and across the nation. Click the image below to join us.

Refer a Colleague

Know someone who would be perfect for CAP®? Send us an email or have them: CLICK HERE TO ENROLL

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