

CENTRAL FLORIDA CAP STUDY GROUP INTENT FORM

Doing More Together For Our Community Through Philanthropy

2022 Central Florida Inaugural CAP® Study Group Agenda Three Meetings per Course – Tuesday 4:00 – 5:30

GS839 – Planning for Philanthropic Impact in the Context of Family Wealth

Registration Deadline: Monday, July 11, 2022

Course Start: Monday, August 8, 2022

Meeting	Location + Zoom	Content Covered	Speaker	Dates
1	TBD	Assignments 1, 2, 3, and 4	Phil Cubeta, TACFS – Welcome, Philanthropy & Donor Advisor Table	Aug
2	TBD	Assignments 5, 6, 7 and 8	Mark Weber - The Legacy Spectrum	Sept
3	TBD	Assignments 9, 10, 11 and Bonus	Andrea Massey, Massey Foundation – Family Foundation Governance	Oct

Exam window July 1 through November 30

GS849 – Charitable Giving Strategies - Course Start: Monday, November 14, 2022

Meeting	Location + Zoom	Content Covered	Speaker	Dates
1	TBD	Assignments 1, 2, 3, and 4	David Torre, Truist - Planning with Charitable Tools	Dec
2	TBD	Assignments 5, 6, 7 and 8	David Odahowski, Edyth Bush Charitable Foundation - Foundations	Jan
3	TBD	Assignments 9, 10, 11 and Bonus	Dr. Russell James, Texas Tech – Statistics and Psychology of Charitable Estate Planning	Feb

Exam window November 1 through March 31

GS859 – Gift Planning in a Nonprofit Context - Coursework Start: Monday, February 20, 2023

Meeting	Location + Zoom	Content Covered	Speaker	Dates
1	TBD	Assignments 1, 2, 3, and 4	Karen Monteleone, UCF – Nonprofit Boards and Governance	Mar
2	TBD	Assignments 5, 6, and 7	Madelyn Weed, CFOCF – Cultivating and Soliciting Gifts	Apr
3	TBD	Assignments 8, 9, and 10	Darrell DeVaney, F4 Wealth Advisors and Kimberlee Riley, CFOCF –Ethics and Donor Intent	Apr
*Time to be determined	The Edyth	Graduation Event	Sponsored/Hosted by Edyth Bush Charitable Foundation	May

1.22

Exam window February 1 through June 30