

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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CAP SUCCESS STORIES

Alan Pratt, CAP, CEP, Pratt Legacy Advisors

"An elderly couple engaged our firm for Legacy Planning from the Heart. As we reviewed their entire balance sheet we discovered they had several old life insurance policies they had forgotten about and really didn't need. We looked at all their choices for what they can do with these policies to create a legacy plan for their grandchildren. They surrendered the policies for cash value and used half of the proceeds to buy a single premium life insurance policy on their son and his wife, naming their grandchildren as beneficiaries (\$1 Million). They used the other half of the proceeds to make an immediate gift to three charities of their choosing. This immediate gift provided a charitable income tax deduction that nearly eliminated the entire income tax consequence incurred on the surrender of the policies. In essence, we found an asset they had in their balance sheet for decades, and were able to make a Legacy Gift and a Charitable Gift that was immediate!"



Richard G. Steinbrueck, CAP, CFP, FIC, Thrivent Financial

"Margie R., a retired Chicago elementary teacher, distributed most of her estate to churches, schools, and other charities. One helpful vehicle was the use of a Charitable Gift Annuity funded by her brokerage account. She received a regular income and at her death, the funds were distributed. One of the recipients, a Lutheran school, received about \$40,000 at a time when they were having significant financial difficulties and her gift was an answer to prayer. She had set up the CGA over 7 years prior to her death. Margie was never married and had no living relatives when she died at age 94. The whole concept of leaving a legacy is addressed by the impact of her life and then the impact at her death on people and organizations she cared most about."



CAP SURVEY RESULTS

Q: If possible, can you put an approximate dollar amount on the additional funding you have helped secure through your clients or donors to non-profits, as a result of your CAP education?

RESULTS SHOW:

- At a minimum \$34,230,000 additional philanthropic dollars have been raised since 2004 from 58 CAPs
- \$600,000 in additional charitable dollars was raised on average per CAP graduate since 2004
- 1,200 CAPs x \$600,000 = \$720 million increased charitable giving based on a little more than a decade of the profession.
- A \$10,000 donation to AIPF = 20 CAP scholarships = potential increased charitable giving of at least \$12,000,000!

Dear Colleagues and Friends,

Before we get into the business of our annual report, I want to acknowledge and thank our 2014 donors for making the work of the Foundation possible. All of you are fully invested in what comes next!

There were some changes to our directors. Suzanne Rohlfs (The Greater Cincinnati Foundation) replaced David Briggs (Briggs Financial) on our board at the end of 2014. We thank David for his service to AiPF, especially his help in developing our grant approach. We are looking forward to working with Suzanne to add the community foundation perspective to our work. We will be actively recruiting at least one or more board members during the latter part of 2015.

During 2014 you helped increase the total number of scholarships awarded by the Foundation to 98! The scholarships have helped to increase the number of CAPs to 1,200 as of the 2015 Q1 report from The American College.

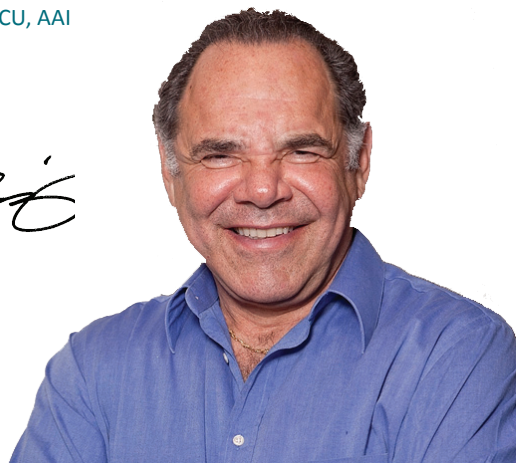
According to the results of a CAP survey sponsored by the Foundation, at least \$600,000 in additional charitable dollars have been raised per CAP graduate since the start of the designation only 11 years ago. Think about this -- 1,200 CAPS times \$600,000 is \$720 million in increased charitable giving based on a little more than a decade of the profession. If you know a funder that can make a \$10,000 contribution resulting in 20 CAP scholarships, their gift could potentially increase charitable giving by at least \$12,000,000! Also, according to the survey of CAPS, making the public aware of the advisor in philanthropy profession was one response shy of 100% in agreement. However, no two CAP responses as to how CAPs tell the public what they do were the same.

In 2014, AiPF started the process of identifying corporate grants and developing new strategies to obtain additional scholarship funding. As we near our 100th scholarship award, we are very proud of our young organization. The board recognizes the importance of your financial assistance to move forward in pursuit of our objectives. Any gift you can make to the Foundation will help us carry out our mission to increase the advisor in philanthropy population and inform the public about the profession. Please use the envelope provided or visit www.advisorsinphilanthropy.com/donations to donate to the Foundation. The opportunity to multiply the impact of their charitable gifts might be attractive to a corporate grant-maker. If you have contacts that could be beneficial to the foundation, we would greatly appreciate a referral to any of us on the board of AiPF.

The Foundation continues to be Fully Invested in What Comes Next. Based on the CAP survey results, greater collaboration between philanthropic advisors, to help expand the public's awareness of the profession, and to raise charitable giving, will be the order of the next decade.

All the best,

Les Winston, CAP, CPCU, AAI
President

YOUR DONATION

Please use the enclosed envelope or visit us at advisorsinphilanthropy.org/Foundation to make a donation.

DID YOU KNOW?

Donors and grantmakers may earmark funding for nonprofit professionals and/or for enhancing philanthropy within their community. Scholarships granted are paid directly to the institution of higher learning.

2014 DONOR CIRCLES OF GIVING

PLANNED GIFTS

Frank & Roseanne Mauro Charitable Trust beneficiary

\$1,000+ LEADERSHIP

Ralph Adamo, CAP
David Briggs, CAP
Gerald Horwitz, CAP
Tony Phifer
John Sullivan
Robert Thompson, CAP
Drake Zimmerman, CAP

Donations received along with estimated future endowment funds total \$116,800 raised in 2014.

\$500+ MENTOR

Sally Alspaugh, CAP
Christopher Jacob

\$250+ PREMIER

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\$25+ FRIENDSHIP

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