Bringing Philanthropy Home

Why now? Why us? Why this course?

- Trillions will be transferred over the next 20 years. But will those dollars come home to our community?
- Without us, as advisors, community foundation staff, and nonprofit leaders, the donor's highest aspirations for their legacy may never be fully realized.
- The course brings us together as a team over ten weeks to help the donor achieve their legacy home run.

Intended Audience

- Professional advisors with expertise in legacy planning and a heart for the community
- The ED, a Board Member, and the Fundraiser (if any) for each participating Nonprofit
- A Faith Foundation or Area Foundation serving as host, convener, and facilitator

Anticipated Activity & Results

- A minimum of five highest-capacity donors for each nonprofit are introduced to legacy planning. At least three embark on a guided process, and at least one makes a principal gift or planned gift within 12 months. Properly implemented, gifts should average $500,000+.

Assessing Feasibility and Readiness

- Do you have a cadre of qualified professional advisors that you know, like, and trust?
- If not, do you have one or two who can help you identify others?
- Do you have committed legacy-age donors who are capable of a significant gift as part of their overall legacy plans?
- Would the organizations you support welcome your leadership as they consider how best to capitalize on the coming legacy wealth wave?
- Can you and your staff commit the time needed to invite your constituents into the process, take the course yourself, and meet every other week for ten weeks with the students?
- As the program takes hold and donors want to discuss their legacy, will you and your staff be able to devote some time and attention?
- Is now the right time?

Testing the waters

- Phil Cubeta, the course creator, will strategize with you before you commit.
- You can test the waters with a Zoom call on legacy planning. Advisors can get CE and decide if they like the approach and want more.
- You may take a free Module by signing in at philanthropyofferings.com.

Pricing

- $595 per participating Nonprofits. Ideally, the ED, a Fundraiser, if any, and at least one board member participate. This puts the action team right there in the room.
- $595 per Professional Advisor. Ideally, they will pay for this themselves.

Bringing Philanthropy Home: Syllabus

Purpose and Significance

We will collaborate across disciplines to help our highest-capacity clients and donors bring their legacy home to their families and to the communities that sustain us all.

Learning Outcomes

By the end of this course, you will be able to:

- Decide what role giving will play in your personal, professional, and civic life.
- Identify appropriate clients and donors for legacy planning.
- Implement a team approach to legacy planning.
- Help our community thrive for generations to come in line with donor intentions.

Course Curriculum

Module 1: Connecting to Our Topic and Each Other
Module 2: Where Philanthropy Fits in Legacy Planning for Families of Significant Wealth
Module 3: Creating a Giving Plan for Various Donor Types
Module 4: Principal Gifts
Module 5: Helping High-Capacity Clients and Donors Hit a Legacy Home Run
Module 6: Charitable Strategies Illustrated
Module 7: Philanthropy in Moments of Conflict
Module 8: Listening for Legacy Signals
Module 9: The Legacy Spectrum
Module 10: Decision Points and Next Steps

How the Course Works

- Recorded Content – 1 Hour Weekly for 10 Weeks
- Study Group Sessions Every Other Week - 1 Hour per Session for 5 Sessions
- Workbook

CE: 8 Hours of CFP CE

About the Course provider

Phil Cubeta, CLU, ChFC, MSFS, AEP, CAP

My original training was in Philosophy, Psychology, and Literature. After a career in financial services, I served for twelve years as The Wallace Chair in Philanthropy at The American College of Financial Services, responsible for the Chartered Advisor in Philanthropy (CAP®) designation. Over 2,000 advisors and nonprofit gift planners received that credential during my tenure. In 2023, I founded Philanthropy Offerings to help my former students and friends bring philanthropy home to the communities in which they actively participate. Email: phil.cubeta@philanthropyofferings.com