



CAP Community Group – 2026–2027 Schedule

The SouthCoast Community Foundation (SCCF) CAP® Study Group is an in-person cohort designed for philanthropic advisors, nonprofit leaders, and allied professionals seeking to deepen their knowledge and practice of effective philanthropy. This study group is offered in partnership with [The American College of Financial Services](#), which administers the CAP® curriculum, coursework, exams, and designation requirements.

SCCF serves as the local convener and host, providing cohort facilitation, in-person learning sessions, guest speakers, and peer-based discussion grounded in real-world philanthropic practice. The schedule below outlines the anticipated meeting dates for the 2026 cohort and is intentionally structured to allow time for coursework, exams, and planned breaks during peak business cycles and major holidays.

If you are interested in participating, please complete the [2026 SCCF CAP® Study Group Interest Form](#). Questions may be directed to Dianne Gauthier Chief Strategy Officer, at dgauthier@southcoastcf.org or 508-962-4186

Day	Date	Sessions	
Session 1: CAP 539 – Context of Family Wealth			
Tuesday	April 21, 2026	Required Orientation	Pre-work
Tuesday	May 5, 2026	Unit 1: Intro to Philanthropic Planning	Unit 2: Personalized Philanthropic Planning
Tuesday	May 19, 2026	Unit 3: Estate and Legacy Planning Beyond Just the Money	Unit 4: Communication with Donors
Monday	June 1, 2026	Unit 5: Engaging Donors from Diverse Backgrounds	Unit 6: It Takes a Village: Assembling Your Team, Including Board Members
Tuesday	June 16, 2026	Unit 7: Developing Recommendations	Unit 8: Putting it all Together Course Review and Exam Preparation
Break for Session 1 Testing			
Prep for Units 1 & 2 of Session 2: 549 – Charitable Giving Strategies			

Session 2: CAP 549 – Charitable Giving Strategies			
Tuesday	July 28, 2026	Unit 1: The Case of Jill Donor	Unit 2: The Tax Framework for Charitable Giving
Tuesday	August 18, 2026	Unit 3: Charitable Remainder Trusts, Gift Annuities, and Single Premium Immediate Annuities	Unit 4: Charitable Lead Trusts
Tuesday	September 15, 2026	Unit 5: Private Foundations	Unit 6: Donor-Advised Funds and Organizations Providing Them
Tuesday	October 6, 2026	Unit 7: Life Insurance, Annuities, Qualified Plan Interests, and Bequests	Unit 8: Other Charitable Tools and Techniques
Tuesday	October 27, 2026	Session 9: Planning for Gifts of Noncash Assets	Unit 10: Three Generations of Hurleys Course Recap and Exam Preparation
Break for Session 2 Testing			
Prep for Units 1 & 2 of Session 3: 559 – Gift Planning in a Nonprofit Context			

Session 3: CAP 559 – Gift Planning in a Nonprofit Context			
Tuesday	January 12, 2027	Unit 1: American’s Nonprofit Sector	Unit 2: Nonprofit Leadership
Tuesday	January 26, 2027	Unit 3: Fundraising Responsibilities of Nonprofit Boards	Unit 4: Cultivating and Soliciting Major, Planned, and Blended Gifts
Tuesday	February 9, 2027	Unit 5: From Stewardship to Accountability	Unit 6: Investing for Impact
Tuesday	February 23, 2027	Unit 7: Gift Planning for Donors, Big and Small	Unit 8: Ethics and Ideals of Gift Planning as a Profession Course Review and Exam Preparation

Celebration Event

Capstone Celebration April 6, 2027, 5:00-6:00pm (Participants, SCCF Board and staff, Guests)