

# ACF/PGRTAZ CAP STUDY GROUP

## Participant Reservation Form

The Chartered Advisor in Philanthropy® is a designation provided by The American College of Financial Services. The CAP curriculum is designed to provide specialized education in philanthropic planning, giving students the knowledge and tools needed to help clients articulate and advance their highest aspirations for self, family, and society.

The ACF/PGRT CAP Study Group is available to CAP students who seek to elevate and deepen their CAP study experience through discussions with other CAP candidates across the relevant disciplines of law, accounting, finance, and gift planning, bringing a broad range of perspectives. In addition to learning through collaborative discourse and real life case studies, study group participants will gain a supportive referral network of like-minded professionals.

To ensure a high functioning and meaningful interactive experience, study group participation will be limited to 15 members and seats will be reserved on a first come, first serve basis. You may reserve your seat by completing and submitting this form to Erica Balderas at [EBalderas@azfoundation.org](mailto:EBalderas@azfoundation.org) or fax to 602.381.1575.

### Study Group Preparation and Expectations

- By submitting this form, you are reserving your seat in the study group (or being placed on a waiting list if already full). Unless you communicate otherwise, it is assumed that your study group participation will begin on the first date of the next available course and continue through three consecutive courses. For current study group dates, visit [azfoundation.org/CAP](http://azfoundation.org/CAP).
- There are five study group sessions for each of the three CAP courses. Participants will make every effort to attend each session and complete the relevant assignments prior to each session.

### Study Group Guiding Principles

- Each session is intended to build on the foundation set by the course material so that participants discuss the impact of what they are learning as it relates to their respective professions and client interactions.
- We will be respectful of each participant's busy schedules, adhering to start and end times for each session.
- Sessions are intended to be social and enjoyable as well as provide a safe, respectful, and collaborative learning environment, e.g., being open to hearing other perspectives, not interrupting while others are speaking, coming prepared and ready to contribute.
- Participants will be present as fully as possible, e.g., limiting outside distractions and sidebar conversations, listening, asking questions and questioning assumptions.

### Contact Information

Name (incl. designations): \_\_\_\_\_ Profession: \_\_\_\_\_

Firm/Company: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Return this form to Erica Balderas by email at [EBalderas@azfoundation.org](mailto:EBalderas@azfoundation.org). For questions, contact Erica at 602.682.2082.



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