



# The Catholic Foundation of Central Florida and F4 Wealth Advisors graduate the inaugural Central Florida CAP® Study Group.

*Orlando, FL - May 24th, 2022*

The Chartered Advisor in Philanthropy is a designation provided by The American College of Financial Services which signifies that the student has successfully passed exams for the three graduate-level courses of cross-disciplinary curriculum.

We are pleased to celebrate and announce the graduation of the inaugural Central Florida Chartered Advisor in Philanthropy (CAP®) Study Group. CAP® is only three little letters but these letters stand for a big commitment to our clients and donors, our professional network, and our Central Florida community. The CAP is an elite designation which provides ethical and technical training for advisors and nonprofit executives to support philanthropists from a multi-discipline and multi-sector perspective. The curriculum spans and synthesizes the arts and sciences of philanthropic planning including taxation, ethical fundraising, purposeful planning, family dynamics, psychology and strategic philanthropy.

The Graduates have spent nine months working through graduate coursework, discussing ideas and experiences and meeting national and regional speakers focused on improving philanthropy in Central Florida. The Central Florida CAP® Study Group engages multi-sector, client-facing advisors including local wealth managers, estate attorneys, private bankers, insurance advisors, certified public accountants and nonprofit executives to create a holistic network that can help clients and donors achieve their philanthropic aspirations and establish their charitable legacies. Central Florida's inaugural CAP Study Group graduates include: Darrell DeVaney, Founder of F4 Wealth Advisors, Greg Meier, Partner of ShuffieldLowman, Wendy Mara, Founder of Mara Law, PA, Rob Thomson CIO of Trivergent Trust Company and Aaron Bert, Investment Advisory Representative of Financial Certified Group, Inc. These graduates will increase our Orlando-area CAPs by more than 60% providing enhanced advisory services to our regional philanthropists. The graduation ceremony, sponsored by Edyth Bush Charitable Foundation, was held May 24th at 8:30 am at The Alford Inn.

“As a proponent of lifelong learning, I saw joining the CAP cohort as a way to reinforce some technical information which I had learned along the way in my career, but also as an opportunity to learn some new concepts and communication skills, especially in resetting the table as an advisor and working with other professionals. Our study group was invested in and connected with each other along the journey.” Rob Thomson, CIO Trivergent Trust Company