

CGP Leadership Institute Membership Requirements

Conversation with Leadership Institute Member [Required prior to submitting application]

Candidate must have a conversation with a current member of the Leadership Institute to discuss membership, the [application](#) and expectations. To schedule a conversation, email Lynn Gaumer, Chair of the Leadership Institute Membership Committee at lynn.gaumer@stelster.com or Michael Kenyon, President and CEO at mkenyon@charitablegiftplanners.org

Gift Planning Experience [Required: 10+ years]

Candidate should have at least ten years of gift planning experience, which may include work in a charitable organization or in a local tax or financial planning position in which the candidate did significant charitable planning with clients. In addition, they should describe a philanthropic plan they have helped to create that illustrates the use of sophisticated planning techniques and/or complex assets.

Professional Leadership [Required: Leadership Position in a gift/legal organization or published author]

Candidate should demonstrate leadership to professional organizations in the field of philanthropic planning. The minimum qualification for Leadership Institute members is board, committee/taskforce or equivalent service to CGP and/or its affiliate councils and at least one other organization, including estate planning councils, bar associations, ACTEC, AFP, ACGA, AHP, NAEPC, SFSP, AALU, CASE, and other fundraising or relevant professional organizations. Alternatively, candidates may present books or published research that significantly advances the understanding and practice of philanthropic planning.

Training and Education [Required: 3 examples]

Candidate should demonstrate experience providing education or training or curriculum consultation on topics related to philanthropic planning. The minimum qualification for Leadership Institute members is three specific examples of any of the following types of service: presentations at professional conferences, published books or articles in professional media (journals/web sites, etc.), mentoring of less experienced colleague(s) outside of the candidate's firm or organization, teaching a course or other training program for charitable planners, or equivalent.



Volunteer Service [Required: One charity for 3+ years]

Candidate should demonstrate involvement as a volunteer with charities or other community organizations. The minimum qualification for Leadership Institute members is sustained service of three or more years to one community organization.

Expectations for Leadership Institute Members

Leadership Institute members should:

1. attend two meetings annually;
2. participate in conference calls; and
3. agree to the commitment of both time and resources.