

CGP Leadership Institute Membership Requirements

Gift Planning Experience

Candidates should have at least ten years of gift planning experience. In addition, they should be able to describe a philanthropic plan they have helped to create that illustrates the most sophisticated donors and/or gifts they have experienced.

Organizational Leadership

Applicants should demonstrate leadership to professional organizations in the field of philanthropic planning. The minimum qualification for Leadership Institute participants is board, committee/taskforce or equivalent service to CGP and/or its affiliate councils and at least one organization, including estate planning councils, bar associations, ACTEC, AFP, ACGA, AHP, NAEPC, SFSP, AALU, CASE, and other fundraising or relevant professional organizations.

Community Involvement

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

Service

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