

Certified Specialist in Planned Giving

A Professional Designation Program

The American Institute for Philanthropic Studies provides planned giving professionals and others who are involved in the planned giving process, with the knowledge and skills required to implement and maintain a successful gift planning program. The goal of the Institute is to set the standard for academic excellence, practical experience, and professional integrity in the field of giving.

The Certified Specialist in Planned Giving (CSPG) program is the training solution for those involved in field of planned giving. It is the only program of its kind and has been overwhelmingly successful since its debut in 1994.

Comprehensive Curriculum

- x In-depth coverage and sophisticated treatment of pertinent topics and issues in the field of planned giving

About the CSPG Professional Designation

This is the only program that offers the Certified Specialist in Planned Giving (CSPG) designation.

This Designation Will:

- x Document your proficiency as a planned giving professional
- x Enhance your marketability
- x Increase your opportunities for advancement in the field

How to Receive the CSPGCM Designation

- x Complete all six modules
- x Complete an examination for each module demonstrating an acceptable level of mastery of the curriculum
- x Complete a practicum for faculty review in which you apply the knowledge and skills learned in the program to your current professional activity or career objective

Learn at Your Convenience

- x You can take modules in sequence or separately as standalone courses
- x Modules are offered every year

Accredited Estate Planner®
Designation Program (AEP)



Interested in Obtaining the Accredited Estate Planner Designation?

Did you know the CSPG course is an approved gateway credential for the National Association of Estate Planners and Councils (NAEPC) Accredited Estate Planner (AEP) Designation Program. The CSPG designation is one of the 12 approved credentials an applicant must have to apply for the NAEPC AEP® designation.

Visit <https://www.naepc.org/> for more information.

Fall 2024 Spring 2025 Course Schedule

Modules One Six

Module One

Module Four

Charitable Gifting Part One: Assets and Entities

Focus on foundations: private, public, supporting, and community; general tax rules, restrictions and limitations.

Charitable Gift Assets Types of classes, risks and benefits of each, and evaluation of assets and procedures for conveying title, ownership, and possession

Instructors: Stephanie Buckley & Elizabeth Bawden

Charitable Gifting Part Two: Other Deferred Gifting Techniques

Focus on design issues, valuation concerns, administration/operation, and obtaining tax deduction and benefits of both outright and deferred methods.

x Outright Mu ous

Faculty

These nationally known experts will put decades of experience at your