

Chartered Advisor in Philanthropy® (CAP®) Graduates

The CAP® program is designed to help participants build stronger client relationships and ensure significant philanthropic impact for their communities. Each year, the Community Foundation of Greater Greensboro facilitates a CAP® study group of local wealth advisors, attorneys, accountants, and nonprofit professionals.

If you are interested in learning how to join this list of CAP® graduates, please reach out to Julie Ann Cooper at JCooper@cfgg.org.

Name	Title	Organization	Designations
Erin Bailey	Director	Tuggle Duggins	CAP®, JD
Ivan Canada	Executive Director	NCCJ of the Triad	CAP®
Julie Ann Cooper	Gift Planning Associate	Community Foundation of Greater Greensboro	CAP®, CPA
Sam Crump	Wealth Management Advisor	Northwestern Mutual	CAP®, CFP®, ChFC®, CLU®, RICP®
Beth Fischer	Vice Chancellor	UNC-Greensboro	CAP®, CFRE, JD
Mike Fisher	Principal & Chief Operating Officer	Diversified Trust	CAP®, CFP®, CPA/PFC, MSA
Keith Hiatt	Partner	Breslow Starling Frost Boger Hiatt	CAP®, AEP®, CPA, MSA
Randall Kaplan	CEO, Nonprofit Board Member	Capsule Group, LLC	CAP®, JD
Mike Mahoney	Director of Investments & Planning	Northwestern Mutual	CAP®, CFP®, CLU®
Ian Patrick	Assistant Head of School for Institutional Advancement	Greensboro Day School	CAP®, Ph. D.
Elizabeth Read	Assistant Director of Planned Giving	Elon University	CAP®

John Reganess	Managing Director, Reganess Wealth Management Group	Raymond James Financial Services	CAP®, CFP®, ChFC®, CLU®
Patrick Rush	Chief Executive Officer	Triad Financial Advisors	CAP®, CFP®, CLU®, MBA
Michelle Schneider	VP & Chief Philanthropy Officer	Cone Health	CAP®, MPA
Vaishali Shah	Chief Executive Officer	Copper Seed	CAP®, CFP®, MBA
David Sprinkle	Nonprofit Board Member	Retired Business Executive	CAP®, CFC®, CLU®, MBA, MSFS
Phelps Sprinkle	VP, Development & Donor Services	Community Foundation of Greater Greensboro	CAP®
John Thomas	Vice President & Senior Wealth Management Advisor	Stearns Financial	CAP®, CFA, CFP®, MBA
Jennifer Windsor	VP, Senior Financial Advisor	Triad Financial Advisors	CAP®, CFP®

CAP® In Progress

Name	Title	Organization	Designations
Tricia Teter Hale	Philanthropy Officer	Cone Health	
Jim King	Partner and Financial Advisor	EMM Financial Services	CFP®, MBA
Athan Lindsay	VP, Grants and Community Impact	Community Foundation of Greater Greensboro	

Marci Peace	VP, Finance and Administration	Community Foundation of Greater Greensboro	CPA, MBA
Emily Promise	Financial Advisor	Blakely Financial, Inc.	CFP®, CDFA®, AIF®, APMA®, CRPC®
Gavin Stevens	Executive Director	Alamance Community Foundation	MBA
Marcus Thomas	Program Office for Community Impact	Community Foundation of Greater Greensboro	
Emily Thompson	Senior Director, Donor Services	Community Foundation of Greater Greensboro	