

Philip Cubeta, CLU[®], ChFC[®], AEP[®], MSFS, CAP[®]

Founder of Philanthropy Offerings

For 13 years Phil was responsible for the Chartered Advisor of Philanthropy designation at The American College of Financial Services. CAP[®] is a Masters-level three course designation for financial advisors and nonprofit gift planners. It focuses on family legacy planning for high-capacity clients and donors.

Before joining The American College, Phil served as Chief of Staff for The Nautilus Group, a service of New York Life Insurance Company, providing estate, business, and philanthropic strategies to affluent clients through 200 of the company's top agents.

In 2022, Phil founded Philanthropy Offerings to provide bespoke education in philanthropy for advisors to wealthy families, as well as for the nonprofits these families love, lead, and support.

Phil's original training was in English Literature, Williams College, BA; Philosophy and Psychology, Oxford University, MA; and English Language and Literature, Yale, MA, M.Phil. He also holds the Masters of Science in Financial Services (MSFS) from The American College.

Phil was inducted in 2022 into the Charitable Gift Planners Hall of Fame. Earlier, he was honored with the Fithian Leadership award by Advisors in Philanthropy. He also has been recognized with the "Power of the Purse" award (Advisor category) from Texas Women's Foundation. He serves on the Planning Giving Board for The Jimmy and Rosalind Carter Foundation. He has served on the Board of National Association of Estate Planners and Councils. And he is a member of The Leadership Institute of The National Association of Charitable Gift Planners. He is also a member of The Ultra High Net Worth Institute.

He lives in Natick, MA, with his wife, Katie, and within a short drive of their two children and three grandchildren.