

## **Diefendorf Adds A Feather To His CAP**

*Monroe "Roey" Diefendorf, Jr., adds the Chartered Advisor in Philanthropy (CAP) designation to his list of educational credentials.*

Bryn Mawr, PA ([PRWEB](#)) February 22, 2010 --- Roey Diefendorf is a veteran philanthropic planner and a pioneer in the "total" wealth management with 40 years of experience. Dedicated to a lifetime of learning, he was compelled to add the prestigious CAP designation to his resume. Roey is the CEO of Diefendorf Capital Planning Associates, a family of financial services companies. Using philanthropy as a tool for promoting family unity, Roey and his 3 dimensional approach to wealth management is precisely the type of creativity and leadership upon which philanthropic planning is founded.

The CAP (Chartered Advisor in Philanthropy) is administered by the American College, Bryn Mawr, PA, as a graduate level program. The required course of study includes, charitable tax, tools and techniques, charitable plans within the context of estate and financial planning, and the management of gift plans in a non-profit context.

Founded in 1927, The American College is the nation's leading educator of professionals in the insurance and financial services industry.

About Diefendorf Capital Planning Associates:

Diefendorf Capital Planning Associates revolves around the family, from their Family of Financial Service Companies to the creation of our 3 Dimensional Wealth Counseling Centers. Their goal is to strengthen families, not just by addressing their financial wealth, but by looking at their "total" wealth, including their personal and social wealth - their "3 Dimensional Wealth." For over 130 years, the family has a rich heritage as industry leaders. Founded by Warren T. Diefendorf in 1875, the legacy had been maintained by Warren E. Diefendorf, Monroe M. Diefendorf, Sr. and now Monroe M. Diefendorf, Jr.

Securities offered through Sterling Monroe Securities, LLC, Member FINRA/SIPC. Sterling Monroe Securities is affiliated with Diefendorf Capital Planning Associates.

For more information about charitable planning, you can contact Roey by e-mail at [Roey\(at\)DiefendorfCapital\(dot\)com](mailto:Roey(at)DiefendorfCapital(dot)com) or call 1-516-759-3900.

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