Philanthropic Planning with Women

Program Outline (Feb 2026)

As wealth shifts hands across generations and genders, we are witnessing more than a financial transition—it's a cultural transformation. Women are not only accumulating unprecedented financial influence but also redefining how that wealth is used to shape families, communities, and the world. Their approach to money is often grounded in values, relationships, and a desire for long-term impact—not just returns.

This curriculum is designed to help advisors understand the broader context of women's financial lives. It moves beyond the numbers to explore how personal identity, lived experience, and systemic dynamics shape women's philanthropic decisions and social investment strategies. Whether you're working with seasoned investors, first-time donors, or next-gen wealth holders, this program offers a lens to better support the diverse goals and legacies women are building today.

Learning Objectives
By the end of the certificate, you should be able to:

- Recognize the history of women's wealth-building and philanthropic leadership, and how that legacy shapes current financial behavior and social priorities.
- Understand the life events and motivations that influence women's philanthropic journeys, and how advisors need to adjust their approach and practices accordingly.
- Advise with the right tools, information, and funding options to help women maximize their impact.
- Develop culturally competent advising approaches for women from diverse backgrounds.
- Support values-aligned strategies, including impact investing as part of a holistic wealth and legacy planning approach.

Module 1	Planning for the New Majority Wealth
Module 2	Life Events that Impact Giving
Module 3	Financial, Estate, and Philanthropic Planning
Module 4	Planning and Engaging with Purpose
Module 5	Investing for Impact
Module 6	Strategy to Execution

Module 1. Planning for the New Majority Wealth

1. **Introduction to the Course**
2. **Introduction to Planning for the New Majority**
3. **Women's History of Finances and Generosity**
4. **Women Today and Their Increasing Financial Power**
5. **Reimagining the Philanthropist: A Call to Advisors**
6. **How Women Give: Values, Resilience, and Impact**
7. **Wrapping Up**

Module 2. Life Events that Impact Giving

1. **Introduction**
2. **Women's Pathways to Wealth**
3. **Life Events That Shape Financial and Philanthropic Decisions**
4. **How Women Give: Motivations, Methods, and Meaning**
5. **Wrapping Up**

Module 3. Financial, Estate, and Philanthropic Planning

1. **Introduction**
2. **Key Financial Behaviors Demonstrated by Women**
3. **Financial Management Approaches for Women**
4. **Women's Financial Engagement Preferences**
5. **Estate Planning Considerations for Women**
6. **Planning for Single Women**

7. Wrapping Up

Module 4. Planning and Engaging with Purpose

1. Introduction
2. Self, Us, Now: Connecting with Self
3. Self, Us, Now: Connecting with Community
4. Self, Us – Now! Taking Action
5. Change in Action: The A-Game Approach — Authentic, Accountable, Activated
6. Advisors as Barriers or Accelerators
7. Wrapping Up

Module 5. Investing for Impact

1. Introduction
2. Why Women Are Driving the Impact Investing Movement
3. What Is Impact Investing?
4. Types of Impact Investments
5. Building a Values-Aligned Portfolio
6. Wrapping Up

Module 6. Strategy to Execution

1. Introduction
2. Purpose Clarification
3. Resource Allocation

4. **Governance Choices**
5. **Strategy Definition**
6. **Vehicle Choices**
7. **Social Impact Tactic Choices**
8. **Assessment & Learning**
9. **Operational Choices**
10. **Legacy Planning**
11. **The Fraye Family Case Study**
12. **Wrapping Up**
13. **Certificate Completion - What's Next**

Questions? Email us - learn@daylightadvisors.com