

ENTERPRISE IMPACT PHILANTHROPY ADVISOR GROUP

ADVISORY FIRMS

In today's shifting wealth landscape, clients want more than investment performance—they want advisors who understand their values, legacy goals, and desire to make a difference.

WHAT IS THE ENTERPRISE IPA GROUP?

The **Enterprise IPA** is a cohort-based learning experience designed for professionals and groups within the wealth advisory sector. Whether you're looking to expand your firm's philanthropic planning capabilities or build a more cohesive approach across advisors, this program helps you elevate your value proposition and client impact.

Firms that invest in the Enterprise IPA group gain:

- A shared language and framework for values-based planning and giving.
- Deeper client relationships across generations and philanthropic interests.
- Stronger team alignment on impact-driven advisory strategies.
- A competitive edge in attracting purpose-driven clients.
- Greater confidence navigating complex giving conversations.

Join a growing movement of forward-thinking firms redefining what it means to advise with purpose.

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IPA expands the traditional definition of philanthropy beyond what we typically describe as a “contribution” of assets. It includes practical tools that enable advisors to better design and implement a strategy to attain a broader social impact for their clients' comprehensive philanthropic efforts.

-Beth Harper Briglia,
CPA, CAP®, IPA



Philanthropy has evolved. So should your training.

IPA WILL HELP YOU



IPA EXPERIENCE

- Live group discussions facilitated by industry practitioners.
- 20 weeks of learning designed by expert advisors.
- Readings, case studies, and video lectures.
- CE available for CFP®, CPWA®, CIMA®, RMA®, CAP®, CSPG^{CM}, CFRE.
- Certified Impact Philanthropy Advisor certification awarded upon completion.

HOW IT WORKS

- Select your cohort: January, April, July, October.
- Two months' advance notice required to launch a group.
- A signed enterprise agreement is required.
- Minimum 10, maximum 15 learners. If fewer than 10 paid registrations, the enterprise is responsible for the cost of the remaining seats.
- One complimentary registration for every three paid.
- Fee per learner:
 - Nonprofit & Independent: \$2,500.
 - For Profit: \$2,850.

WHAT'S INCLUDED

- Dedicated Daylight partnership manager.
- Certified IPA facilitator assigned to your group.
- Custom registration link and group onboarding.
- For Learners:
 - Online community with other IPA learners.
 - Access to Daylight's Collaborative Philanthropy Certificate (\$800 value).
 - Access to the Impact Advisors Network (IAN) after graduation (\$300 value).
 - One year of access to Advisors in Philanthropy (AiP) after graduation (\$350 value).