



Your learning partner for growth and impact.

Dear Friends,

As donor-advised funds (DAFs) continue reshaping charitable giving, advisors are being asked more complex questions—and are expected to provide increasingly sophisticated guidance. Their expanding roles in philanthropy are attracting a broader range of donors, giving strategies, and sponsoring organizations. At the same time, that growth has introduced new complexity, promoting ongoing debate and raising important questions among donors, advisors, nonprofits, and policymakers alike.

To help advisors navigate the evolving DAF landscape with confidence, Daylight is launching a new two-part training program. The **Essentials of Modern DAF Advising Certificate** provides an objective, practice-oriented overview of today's DAF ecosystem and explores how advisors can thoughtfully integrate DAF strategies into client relationships and planning conversations. Building on that foundation, the **Advanced DAF Certificate** will offer an immersive, practitioner-focused experience for advisors who actively structure, guide, and influence philanthropic giving through DAFs. Watch for launch details in the coming weeks and secure your early access to the new certificates.

In the meantime, explore these on-demand DAF resources at [DAFopedia](#).

- [When Grants Get Stuck](#) by Travers Oliver, CAP®, IPA, Head of Philanthropic Services, Founders Pledge.
- [5 Ways Advisors Can Use DAFs to Advance Climate Goals](#) by Brad Leibov, CEO, EarthShare.

Advisors are leaning into philanthropy—but where are they focusing? A recent TPI study found that 85% of advisors plan to deepen their knowledge of philanthropy. Here's where advisors are focusing their attention:

- Impact investing (85%)
- Integrating charitable goals into wealth plans (44%)
- Nonprofits and community/social needs (43%)

As advisor demand grows, Daylight's [Impact Investing Certificate](#) helps turn interest into practical capability. We've also added a new module on *Impact Investing Through DAFs*, helping advisors navigate one of the fastest-growing areas of philanthropic planning. If you're looking to build this skill set, now is the time.

Daylight learners are leading the way. Across the field, Daylight learners are shaping policy, advancing philanthropy, and leading important industry conversations.

- [Jon Kraus, MNM, IPA](#), helped lead efforts to pass [Colorado Senate Bill 26-118](#) into law. The bill requires financial institutions to distribute transfer-on-death proceeds to charitable organizations within 60 days of notice, without requiring charities to open new accounts or provide personal information about officers or directors.

- Our IPAs are leading the [Southern California Council of Charitable Gift Planners](#) Annual Conference. Join Chair [Danese Bardot, JD, CFRE, IPA](#), and Co-Chair [Cris Chaparro Lutz, CAP®, CSPG, IPA](#) in Costa Mesa, May 20-22.
- [Jen Goh, IPA](#), of The Majority Trust in Singapore, was named in [Prestige 40 Under 40](#).
- Certified IPA [Kathi Littmann](#), President and CEO of the Greater Tacoma Community Foundation, was recently [featured](#) by NationSwell for her leadership in advancing community philanthropy and equitable impact initiatives across Pierce County.
- [Padric Scott, IPA](#), CEO of Crossroad Capital Partners, and a member of Daylight's Advisory Board, reflects on his journey in this article, "[What my NFL career taught me about guiding retirees.](#)"
- [Yvonne Moore](#) of Moore Philanthropy, a member of Daylight's Advisory Board, explores what US funders can learn from philanthropic practices of the global majority.
- Beyond technical expertise, advisors are also rethinking how clients experience philanthropy. Ideas42, our partner on the [Behavioral Philanthropy Certificate](#), has released the [Generosity by Design](#) guides. Join [Tony Macklin, IPA](#), and [Julia Ritz Toffoli, IPA](#), to explore how learning and feedback can strengthen donors' giving practices and make philanthropy more rewarding over time. [Register](#) for the session (May 27).
- Our partner, NNCG, is hosting a [webinar](#) with [Sharmila Rao, IPA](#), and [Tony Macklin, IPA](#), on the opportunities and challenges of advising families. Together, they'll explore how advisors can become trusted guides across wealth, values, governance, and philanthropic strategy (June 18).

Take the next step in your philanthropic advising practice.

- Join the [June 10 IPA Info Session](#) and receive \$250 off registration.
- Register for the July or October [Certified IPA](#) Program. We anticipate selling out again, so secure your spot early.
- Access all Daylight certificate programs for \$1,500, including [Behavioral Philanthropy](#), [Impact Investing](#), and [Philanthropic Planning with Women](#). Complete all six certificates to earn 30.5 CE hours while building a comprehensive philanthropic advising skill set.

We'll be at the following events—Come say hello.

- [Western Regional Planned Giving Conference](#), May 20-22, Costa Mesa. Crystal Thompkins and Dien Yuen will present the Gift Planning Competency, one of the 13 competencies in the Daylight Philanthropic Advising Competency Model.
- [The UHNW Institute Women's Leadership Summit](#), June 10-11, Palm Beach
- [Purposeful Planning Institute \(PPI\) Rendezvous](#), July 20-23, Boulder. Certified IPAs Tony Macklin and Marguerite Griffin, along with Daniel Felix, will be presenting on Collaborating Competently Around Client Purpose and Social Impact.
- [WOC Symposium 2026](#), June 24, New York
- [DAF Giving Summit](#), September 23-25, Austin

Thank you for being part of a growing community of advisors shaping the future of philanthropic advising.

Your learning partner,
Team Daylight

Daylight

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