Daylight

CHARITABLE PLANNING FOR WEALTH ADVISORS CERTIFICATE

Charitable giving is an important part of many clients' wealth, tax, and estate plans. The advisor's work begins with understanding what the client hopes to accomplish and continues through the selection, execution, and review of a gift.

This certificate prepares wealth advisors to recognize the charitable planning opportunities, gather the facts that shape a gift, compare common assets and approaches, coordinate specialist expertise, and follow through within the advisory relationship. The curriculum blends technical expertise with cultural and values-driven insights, preparing advisors to navigate complex planning conversations and solutions for clients and the organizations they care about.

In 2024, Americans gave **$45.8 billion** to charities through bequests — representing 8% of the nation's total charitable giving of $592.5 billion.

Giving USA 2025 Report

LEARNING OBJECTIVES

- Recognize when a client's charitable interests or financial circumstances call for planning, and define the wealth advisor's role alongside other professionals.
- Conduct discovery that identifies the client's charitable aims, financial capacity, family considerations, timing, and preferences before proposing an approach.
- Compare common gift assets, recipients, giving vehicles, and income or estate strategies in light of the client's objectives and tradeoffs.
- Identify the planning, acceptance, valuation, tax, and transaction questions that arise with complex assets and engage the appropriate specialists.
- Coordinate the steps needed to implement a gift, document decisions and responsibilities, and confirm that the completed gift is reflected in the client's plan.
- Incorporate charitable planning and periodic review into an advisory practice while observing professional boundaries, firm policies, and disclosure requirements.

FEATURED INDUSTRY PRACTITIONERS

Aquanetta Betts
JD, CAP®, AEP®, CFRE
Johnson Betts, LLC

Russell James
J.D., Ph.D., CFP®
Prof., School of Financial Plng, Texas Tech Univ.

Crystal Thompkins
CAP®, CSPG, IPA
Dir., Strategic Impact
Daylight

FACULTY

Tony Steuer, IPA, is a Financial Readiness Advocate, award-winning author, and host of the Get Ready: Before Life Happens podcast. Drawing on nearly 40 years of experience in insurance, financial education, and consumer advocacy, including decades as a fee-based life insurance consultant, he helps people create an in-case-of-emergency plan, ask better questions, recognize red flags, organize what matters, and prepare before life happens.

Dien Yuen, JD, LLM, CAP®, AEP®, IPA, is the founder and CEO of Daylight. Previously, Dien founded the Center for Philanthropy and Social Impact at The American College of Financial Services, where she served as the Blunt-Nickel Professor in Philanthropy. She also helped develop the curriculum for the Certified Impact Philanthropy Professional program at Singapore's Wealth Management Institute (WMI), which recognized her with its Distinguished Faculty Award. Dien was named CEO of the Year in the Professional Services Firms category at the 2026 Wealth Management Industry Awards and is a 2026 Forbes 50 Over 50 honoree.

CERTIFICATE MODULES

- The Charitable Planning Landscape
- Donor Discovery
- Gift Assets and Strategies
- Planning Opportunities with Complex Assets
- Integrating Gift Planning into the Advisor's Practice

COURSE FORMAT

Program Type: Certificate program - asynchronous course with module quizzes
Program Delivery: Readings, lectures, videos, graphics, downloadable advisor resources
Program Length: 5 hours
Program Complexity Level: Intermediate

Daylight is an approved CE sponsor.
Continuing education credits are pending for completion of the Charitable Planning for Wealth Advisors Certificate.
CFP®, CPWA®, CIMA®, RMA®, CAP®, CFRE, CSPG^{CM}

Register for the an individual certificate or an Annual Certificate Subscription now!