IMPROVING YOUR PHILANTHROPIC ADVISING BUSINESS

Daylight

Wednesday, May 28, 2025
10 am PT/ 1 pm ET
Registration required

learn@daylightadvisors.com
www.daylightadvisors.com

You're part of a growing group of professionals offering philanthropic guidance to clients. Whether you're aiming to expand your practice, champion specific causes, or tap into the great wealth transfer, it's worth asking: Is your current business model as effective as it could be? And will it scale in the way you envision?

Join Team Daylight for an engaging session on the challenges advisory practices face—and the steps successful firms take to boost profitability, deepen client relationships, and amplify social impact. (We've read the research, so you don't have to do it!) Hear firsthand from two Certified Impact Philanthropy Advisors as they share insights from the front lines.

This webinar is for wealth planners, gift planners, philanthropic advisors and consultants, estate planners, and more.

Crystal Thompkins
Director,
Strategic Impact
Daylight

Tony Macklin
Director,
Advisor Practice
Daylight

John Unterreiner
Financial Advisor and
Dir. Philanthropic Planning
Socium Advisors

Register

Webinar will not be recorded.

Special offer!
All attendees are eligible to receive $250 off a July or October IPA registration.