IMPACT PHILANTHROPY ADVISOR
Powered by Daylight

A NEW STANDARD FOR IMPACT

THE IMPACT PHILANTHROPY ADVISOR CERTIFICATION

Daylight's learning platform and network are designed exclusively for wealth and philanthropic advisors, to help you meet this extraordinary opportunity to grow your business, client relationships and impact.

Your home for lifelong learning, Daylight has something for all advisor skill levels and roles – and becoming an **Impact Philanthropy Advisor is where you start**.

With a mix of expert facilitation and on-demand instruction available online over 20 weeks, the Impact Philanthropy Advisor certificate (IPA) offers the skills and connections to confidently support the needs and expectations of families, organizations and communities today.

IPA will help you:

- **Deepen** client relationships
- **Seize** growth opportunities
- **Accelerate and share** your skills
- **Spark** social impact and family legacies

It's a transformative era for wealth and philanthropy, requiring new competencies and cultural dexterity to thrive. Amidst a historic $85 trillion intergenerational transfer of wealth, clients are turning to advisors for more than investments and tax planning, and philanthropy's tools, considerations and goals have become more complex.

It's the perfect time to skill up with IPA.

THE IPA EXPERIENCE

The Impact Philanthropy Advisor certification is a state-of-the-art learning program crafted with decades of experience in philanthropic advising, wealth management and philanthropic education.

IPA is the flagship course created by Daylight, founded by advisors and educators, Dien Yuen and Tony Macklin, to meet the demand for contemporary and robust learning solutions. The Advisory Board and faculty, representing the sector's diversity and breadth, ensure IPA is accessible, relevant and valuable.

IPA participants will receive

- **20 weeks of learning** designed by expert advisors
- **On-demand content** and case studies
- **Live group discussions** facilitated by industry practitioners
- **New peer connections** within your cohort
- **Continuing education credits**
- **Complimentary content** just for IPAs
- **First access to the Advisor Hub** and Learning Labs
- **Celebrations and graduation** invitations

IPA WILL ADVANCE YOUR PRACTICE IN 3 AREAS

TECHNICAL

- Align client values and priorities to achieve philanthropic objectives
- Assess features and benefits of charitable and non-charitable giving tools
- Integrate giving strategies within wealth, estate, tax, and philanthropic planning opportunities

RELATIONAL

- Apply a cultural dexterity framework to support a range of client generations and backgrounds
- Identify the phases of the client impact journey and motivations
- Develop your skills and personal style to deepen philanthropic conversations

PRACTICAL

- Examine the current philanthropic landscape, trends and debates
- Develop a sustainable philanthropic strategy and expand client relationships
- Assess the ethical obligations of a philanthropy advisor

IPA MODULES

Fundamentals	Evolving demands for social impact services from different client segments; the new map of social impact advising services and competencies
Social Impact Landscape	Trends in uses of resources across multiple sectors; networks and associations in philanthropy; current policy and practice debates
Art of Philanthropic Advising	Modalities of advising; challenging assumptions of our roles; client philanthropic journeys; techniques to support progress
Purpose and Strategy	Developing client values, desired impact, understanding of the ecosystem, strategy statement; addressing inequities
Charitable Tax Planning	Substantiation; types of assets to give and identifying opportunities to use those assets; gift acceptance policies and donor due diligence
Charitable Giving Strategies	Application of tools such as bequests, life estates, retirement assets, life insurance, charitable trusts, and charitable gift annuities
Foundations and Donor Advised Funds	Advantages, disadvantages, critiques, applicability of charitable vehicles for grantmaking and operating programs
For-Profit Vehicles	Advantages, disadvantages, critiques, applicability of forms of impact investing and types of purpose-led businesses
Influence, Leverage, & Civic Action	Use of advocacy, lobbying, crowdfunding, movement building, and similar tools and strategies
Planning for the Future	Anticipating clients' future needs; clarifying value propositions and advisor collaborations; personal development agendas
Ethics in Philanthropic Advising	Defining responsibilities to self, client, community, and the profession
Cultural Dexterity	Understanding how our social identities, family traditions, and cultural backgrounds influence wealth, estate, and philanthropic planning

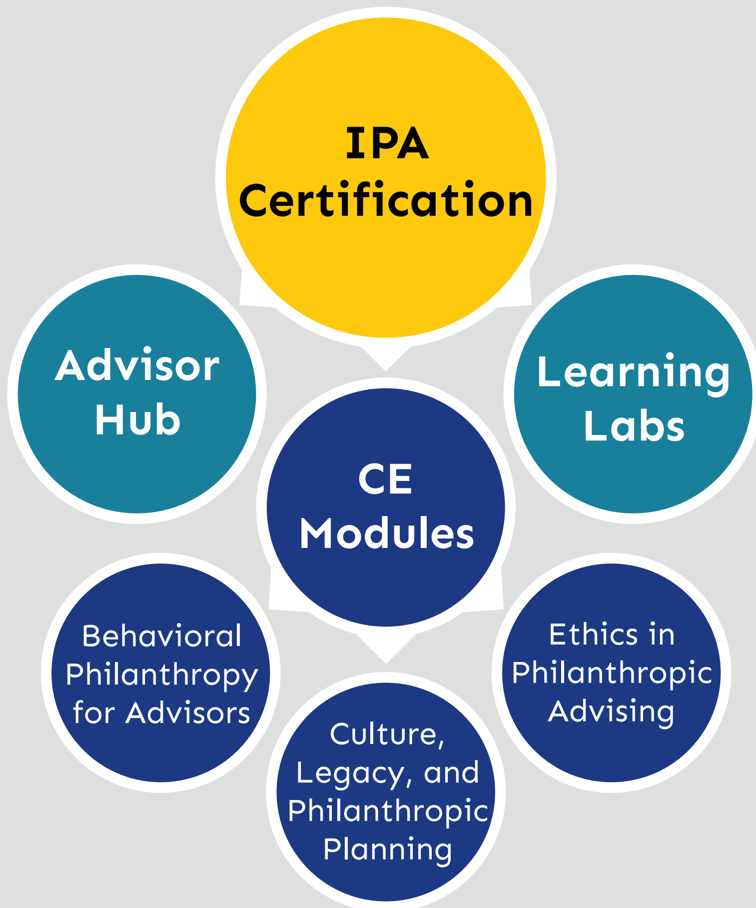
WHO NEEDS TO BE AN IPA?

Social impact is not just for specialists. Whether in a wealth management firm, DAF sponsor or community foundation, family office, grantmaker or nonprofit, many roles benefit from fluency in philanthropy.

IPA is for:

- **Client-facing advisors** and team members, to better understand your clients and their families, the options available to them, and to collaborate with fellow advisors.
- **Business development roles**, to be nimble and opportunistic with the demands of U/HNW families today.
- **Planning and philanthropic specialists**, to support junior team members, and for advanced leaders to update their knowledge and be first to access new courses.
- **Associates interested in social change**, to further their career development and boost corporate loyalty and retention.

ADVISOR LEARNING JOURNEY



ADVISORY BOARD

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You have the chance to participate in the most ambitious, modern philanthropic learning opportunity available, and benefit from Daylight's national network and years of instructional and practitioner expertise.

IPAs can immediately leverage new skills, connections and visibility with clients and teams, and in the marketplace. Special partnership opportunities are available for organizations interested in maximizing IPA's national kickoff.

HOW IT WORKS

- About 30 hours, start-to-finish
- 12-15 advisors per cohort
- 12 self-paced modules
- 5 case studies
- 10 live virtual cohort conversation
- IPA Workbook

FEES

Standard:
$2,850

Nonprofit:
$2,500

First 250 registrants will receive a $250 discount.

Cohorts starting in October 2024 and January 2025.

REGISTER AT

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