Daylight

Certified Impact Philanthropy Advisor

Program Outline (Jan 2026)

The **Impact Philanthropy Advisor (IPA)** certification is a comprehensive, professional program designed to prepare advisors to meet the growing demand for sophisticated, values-aligned philanthropic guidance. The program integrates technical training, relational advising skills, and practical application to equip learners to serve a diverse and evolving client landscape.

Learning Objectives
By the end of this program, you will be able to:

- Diagnose and articulate client values, priorities, and motivations.
- Evaluate and compare the strategic uses, benefits, and limitations of charitable and non-charitable giving tools across diverse client scenarios.
- Integrate philanthropic strategies seamlessly into comprehensive wealth, estate, tax, and legacy planning to maximize client impact.
- Apply a cultural dexterity framework to engage effectively with clients across generations, identities, and cultural backgrounds.
- Apply the various donor impact journey frameworks and leverage behavioral insights to support clients' decision-making and engagement.
- Design sustainable philanthropic strategies that support clients' long-term goals while expanding advisory opportunities and relationships.
- Strengthen your advising style and communication techniques to foster deeper, more confident conversations about purpose, impact, and giving.
- Analyze current trends, debates, and shifts in the philanthropic landscape.
- Identify and navigate ethical obligations and dilemmas in philanthropic advising.

MODULES

1. Fundamentals	7. Foundations and DAFs
2. Social Impact Landscape	8. Impact Investing & Alternative Tools
3. The Art of Philanthropic Advising	9. Influence, Leverage & Civic Action
4. Defining Purpose & Strategy<	10. Planning for the Future
5. Charitable Tax Planning in the U.S.	11. Ethics in Impact & Philanthropic Advising
6. Legacy and Gift Planning	12. Cultural Dexterity & Philanthropic Planning

Module 1. Fundamentals

1. Program Welcome and Module Overview
2. Setting Context
3. The Market for Philanthropic Services
4. The Ecosystem of Advising
5. Philanthropic Advising Services
6. Module Wrap-Up

Module 2. Social Impact Landscape

1. Module 2 Overview
2. The United Nations Sustainable Development Goals
3. The United States Social Sector
4. The U.S. Nonprofit Sector
5. Challenges and Challenging Norms in the Social Sector
6. Module 2 Wrap-up

Module 3. The Art of Philanthropic Advising

1. Module 3 Overview
2. What Role(s) Will You Play with Your Clients?
3. Challenging our Assumptions
4. Understanding the Client’s Philanthropic Journey
5. Guiding the Philanthropic Journey
6. Module 3 Wrap-Up

Module 4. Defining Purpose & Strategy

1. Module 4 Overview
2. Let's Define Purpose
3. Let's Define Strategy
4. Trends in the Social Sector
5. Module 4 Wrap-Up

Module 5. Charitable Tax Planning in the U.S.

1. Module 5 Overview
2. Fundamentals
3. Gifts of Complex Assets
4. Fruit Salad
5. Applying Module 5
6. Module 5 Wrap-Up

Module 6. Legacy and Gift Planning

1. Module 6 Overview
2. Estate Planning
3. Bequests
4. Retirement Accounts
5. Life Insurance
6. Charitable Gift Annuities
7. Charitable Remainder Trusts
8. Charitable Lead Trusts
9. Applying Module 6
10. Wrap-Up

Module 7. Foundations and DAFs

1. Module 7 Overview
2. Public Foundations and Community Foundations
3. Donor-Advised Funds
4. Supporting Organizations
5. Private Foundations
6. Private Operating Foundations
7. Wrap-Up

Module 8. Impact Investing & Alternative Tools

1. Module 8 Overview
2. Impact Investing
3. Charitable LLCs
4. Purpose Trusts
5. Purpose-Led Businesses
6. Module 8 Wrap-Up

Module 9. Influence, Leverage & Civic Action

1. Module 9 Overview
2. Influence Strategies
3. Leverage Strategies
4. Civic Action Strategies
5. Applying the Strategies
6. Module 9 Wrap-Up

Module 10. Planning for the Future

1. Module 10 Overview
2. Planning for Change
3. Your Future Philanthropic Advising

4. Working Within the Ecosystem of Advisors
5. Module 10 Wrap-Up

Module 11. Ethics in Impact & Philanthropic Advising

1. Ethics Module Overview
2. Responsibility to Yourself
3. Responsibility to Your Client
4. Responsibility to the Community
5. Responsibility to the Profession
6. Ethics Module Wrap-Up

Module 12. Cultural Dexterity & Philanthropic Planning

1. Introduction
2. Cultural Competency
3. Global Dexterity
4. Cultural Dexterity & Philanthropic Advising
5. Cultural Dexterity Module Wrap-Up
6. IPA Program Wrap-Up