IMPACT PHILANTHROPY ADVISOR
Powered by Daylight

A NEW STANDARD FOR IMPACT

THE IMPACT PHILANTHROPY ADVISOR CERTIFICATION

Amidst a historic $124 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.

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.

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

Net Promoter Score

Our IPA program received a **world-class rating** that reflects the strength of our learning community.

NPS
83

"Consider **the IPA Certification a launching pad** to elevate and strengthen one's confidence in being able to better serve those they're called to guide. I'm excited about the domino effect that will be felt throughout time by the advisors and consultants who lean into the wisdom that is collectively shared here."

Padric H.B. Scott
Founder & CEO,
Crossroad Capital Partners

THE IPA EXPERIENCE

518	328	97%	50	12
IPA Learners Enrolled	Certified IPAs	Graduation Rate	Community Foundations Represented	Countries/ Regions

The IPA certification is a state-of-the-art learning program.

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 Impact Advisors Network**
- **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

WHO NEEDS TO BE AN IPA?

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.

"Daylight offers a **comprehensive view of the field** along with **practical tools** to help shape your unique approach. In a space where formal certification has been lacking, Daylight is leading the way by helping professionals build core competencies and define their practice."

Jennifer Curry
Director of Giving Strategies,
Oregon Community Foundation

IPA MODULES

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

FACULTY INCLUDES

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

Ginni Galicinao
ACFBA, ACFWA, CAP®, CPCC, ORSC, IPA
Dynamics of Family Wealth

Seth Klukoff
IPA
Eoan Strategies

Mark Greer
MBA, CAP®, IPA
Phila Engaged Giving

Beth Harper Briglia
CPA, CAP®, IPA
Philanthropic Advisor

Successful completion of the IPA program provides 16 hours of eligible CE credit.

- CFP Board | Certified Financial Planner® (14.5 eligible hours)
- Investments and Wealth Institute | Certified Private Wealth Advisor®, Certified Investment Management Analyst®, Retirement Management Advisor®
- The American College of Financial Services | Chartered Advisor in Philanthropy®
- The American Institute for Philanthropic Studies, CSU Long Beach | Certified Planned Giving Specialist®
- Certified Fund Raising Executive International | CFRE

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 conversations

FEES

For Profit Professionals:
$2,850

Nonprofit &
Independent Practitioners:
$2,500

REGISTER AT

www.daylightadvisors.com/impact-philanthropy-advisor
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