GIFT PLANNING CERTIFICATE

With more than $105 trillion passing to the next generation and $18 trillion to charities, now is the time for advisors to deepen their expertise in gift planning to effectively support their clients' philanthropic plans.

The Gift Planning Certificate equips advisors with the knowledge and tools to help clients make meaningful, tax-efficient gifts that reflect their values and create lasting legacies.

The program explores the fundamentals of gift planning, the giving vehicles every advisor should know about, and forward-thinking strategies for donating noncash assets. It also examines emerging trends in philanthropy and how advisors can leverage them to create positive outcomes for both clients and their communities. 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

- Understand the core principles of gift planning, including key giving vehicles and the strategic opportunities created through noncash gifts.
- Equip advisors with practical tools and frameworks to help clients achieve their philanthropic goals and make a lasting impact through gifts from their estate and financial plans.
- Evaluate how current giving trends, generational shifts, the great wealth transfer, and cultural nuances influence decision-making and long-term giving strategies.

FACULTY

Aquanetta Betts, JD, CAP®, AEP®, CFRE

Aquanetta Betts is the founder and principal consultant of Johnson Betts, LLC. She has experience helping nonprofits grow their planned giving pipelines, and she partners with professional advisors and charitable individuals on effective giving strategies.

Crystal Thompkins, CAP®, CSPG, IPA

Crystal Thompkins is Director of Strategic Impact at Daylight and founder and principal of TrueCrystal Consulting. She has a depth of experience in planned giving program management and philanthropic planning across the wealth spectrum, with a focus on increasing awareness of and access to gift planning resources and education.

MODULES:

- What is Gift Planning?
- Donor Motivations and Goals
- Gift Planning Vehicles
- Estate Planning Integration
- Legacy and Succession

COURSE FORMAT

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

Daylight is an approved CE sponsor. Continuing education credits are pending for completion of the Gift Planning Certificate.

CFP®, CPWA®, CIMA®, RMA®
CAP®, CFRE, CSPG℠

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

Individual OR Annual Certificate Subscription Registration

IPA + Annual Certificate Subscription Bundle Registration

Questions? Email info@daylightadvisors.com