

PHILANTHROPIC PLANNING WITH BUSINESS OWNERS

More than 99% of U.S. companies are privately owned. Their founders and owners contribute more money and time than non-entrepreneurs. They're more likely to consider themselves philanthropists, to be hands-on in their philanthropy, and to leave legacy gifts. Additionally, approximately 69% of these business owners intend to incorporate charitable giving into their plans for exiting their businesses.

In this certificate, you'll learn about demographic trends in wealth building through business ownership and the philanthropic planning implications of various business structures and assets. You'll gain insights into frameworks for managing companies' philanthropy and social impact programs. You'll also learn about your role in helping business owners find their purpose and meet philanthropic planning goals before, during, and after exits from their businesses.

LEARNING OBJECTIVES

- Understand how philanthropic planning fits into the lifecycle of starting, growing, and exiting different types of business entities.
- Compare opportunities and challenges of charitable planning with several types of business assets.
- Choose potential options for a business to formalize its philanthropy or social impact program.
- Evaluate the potential impact of business ownership transition options on the owner and their philanthropic goals.
- Propose philanthropic planning solutions for a case study of a "millionaire next door" business owner.

73%

of entrepreneurs have spoken with an advisor about giving, compared with half of non-entrepreneurs.

Entrepreneurs as Philanthropists,
Fidelity Charitable

MODULES:

- Fundamentals of Entrepreneurship and Business Ownership
- Charitable and Estate Planning with Business Owners
- Business Philanthropy and Social Impact Choices
- Philanthropy as Part of Business Transition & Exit Planning
- Case Study Exercise, Post-Ownership, and Advisory Roles

FACULTY



David Flores Wilson, CFA, CFP®, CEPA®, CM&AA, Managing Partner at Sincerus Advisory, advises entrepreneurs and business owners in New York City on personal financial planning issues from formation to exit and beyond.



Denise Sarkor, with over 18 years of experience at the intersection of financial services, business strategy, and human development, is Principal & Private Wealth Advisor at Sarkor Financial Advisors—a fee-only financial planning and investment management firm.



Lillie N. Nkenchor, Esq., LL.M. is the Founding and Managing Attorney of Lillie N. Nkenchor, PC, where she drafts estate planning and business documents and resolves complex legal issues for individuals, families, and business owners.



Ryan Raffin serves as Partner, Noncash Assets & Compliance, for Charitable Solutions, LLC. His work focuses on compliance, tax, and due diligence issues relating to complex charitable giving, and involves assessment of proposed donations and liquidation of donated assets.



Sarah Taylor is the founder of Taylor Impact Group, where she helps individuals, families, foundations, and companies build their legacy through purposeful and strategic giving.



Tony Macklin leads the development of new education programs and field-building projects as Daylight's Director of Advisor Practice. He is a philanthropist, philanthropoid, and philanthropy geek.

COURSE FORMAT

Program Type: Certificate program - asynchronous course with module quizzes

Program Delivery: Readings, lectures, videos, graphics, downloadable advisor resources

Program Length: 8-10 hours

Program Complexity Level: Basic

Daylight is an approved CE sponsor.

Continuing education credits are pending for completion of the Philanthropic Planning with Business Owners Certificate.

CFP®, CPWA®, CIMA®, RMA®

CAP®, CFRE, CSPG^{CM}

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

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