Advancing the Philanthropic Advising Field:

A Working Summit to Shape What Comes Next

April 5-6, 2027 | Tempe, Arizona | Venue to be announced.

As clients navigate increasingly complex decisions about wealth, family, business, and giving, philanthropic advising is becoming relevant across a growing range of professional disciplines. Advisors bring different expertise, perspectives, and approaches to their work, yet opportunities to connect across disciplines, share knowledge, and develop a common understanding of the field remain limited. As the demands on advisors continue to evolve, greater collaboration across the field becomes increasingly important.

The Daylight Summit will convene professionals from wealth management, philanthropy, law, accounting, family offices, foundations, and charitable organizations to explore where the field stands today and what it needs to strengthen for the future. Unlike traditional conferences built around presentations and panels, the Summit is designed for active participation, collaborative exploration, and shared learning.

Through facilitated discussions, participants will share their experiences, examine common challenges, and identify opportunities and priorities for advancing philanthropic advising.

Working Groups

Building the Profession

- Professional Identity, Standards & Ethics
- Competencies, Education & Professional Development
- Talent, Career Pathways & Workforce Development
- Business Models, Institutional Adoption & Market Demand
- Research, Evidence & the Value of Philanthropic Advising
- Public Awareness, Trust & Demand for Philanthropic Advising

Advancing the Practice

- Technology, AI & the Future of Advisory Practice
- Advisory Practice, Service Quality & Client Outcomes
- Access, Inclusion & Changing Client Needs

Strengthening the Ecosystem & Outcomes

- Ecosystem Collaboration & Collective Infrastructure
- Philanthropic Impact & Connections to the Social Sector

Topics are illustrative and may be subject to change.

Questions We'll Explore

- How might we be better connected and organized?
- What shared competencies, practices, and resources are needed to strengthen the quality of advising as philanthropic decisions become more complex?
- How are technology, AI, and changing client expectations reshaping the work?
- What barriers limit access to high-quality philanthropic advice, and how might the field address them?

Beyond the Summit

Daylight will synthesize insights from the working groups into a post-summit report highlighting themes, shared challenges, and priorities for continued exploration and action. The report will be shared with participants and the broader professional community to inform future research, educational initiatives, and cross-disciplinary collaboration.

Why Sponsor the Daylight Summit?

As a sponsor, your organization will:

- **Help shape a shared vision for the field.** Support a dedicated gathering where practitioners examine challenges, exchange expertise, and identify future priorities.
- **Build connections across the advisory ecosystem.** Engage with professionals from wealth management, philanthropy, law, accounting, family offices, foundations, and charitable organizations.
- **Contribute to substantive discussions.** Join facilitated working groups alongside practitioners and institutional leaders to explore emerging needs, professional competencies, and opportunities for collaboration.
- **Extend the impact beyond the Summit.** Support the development of a post-summit report that captures key insights, priorities, and opportunities for continued collaboration.

	$25,000 Founding	$15,000 Leadership	$10,000 Partner	$5,000 Supporting	$3,000 Contributor	$1,000 Friend
Included summit registrations	**8**	**5**	**4**	**3**	**2**	**1**
Featured event recognition	Lunch Sponsor	Breakfast or Reception Sponsor	Graduation Sponsor(s)			
Recognition on summit website	Premier	Featured	Featured	Logo	Logo	Name
Recognition in summit materials	Premier	Featured	Featured	Logo	Logo	Name
Recognition during opening and closing sessions	Premier	Featured	Featured	Group	Group	Name
Recognition in post-summit report	Premier	Featured	Featured	Logo	Logo	Name
Founding sponsorship limited to one organization; Leadership sponsorship limited to two. Recognition placement and prominence vary by sponsorship level. All acknowledgments are subject to Daylight's event branding guidelines.						

Frequently Asked Questions

1. Will there be an exhibition hall or sponsor tables? No. The Summit is designed around participation and relationship-building, not a traditional exhibition format.

2. Will sponsors have speaking roles? The Summit will not feature sponsored presentations or promotional speaking opportunities. The program focuses on facilitated discussions and working groups, with sponsors participating alongside other attendees.

3. Will sponsors have input into the agenda or report? Sponsors are welcome to contribute their perspectives as participants. Daylight retains responsibility for developing the Summit agenda, facilitating discussions, and synthesizing findings.

4. When is our sponsorship payment due? Payment details and deadlines are provided in the sponsorship agreement. Sponsorship opportunities are limited at each level and will be confirmed upon receipt of payment.

5. How do sponsor participants register? Sponsors will receive a registration code and instructions for registering their allotted participants.

6. Who is expected to attend the Summit? The Summit will bring together approximately 250 professionals from across the philanthropic advising ecosystem, including wealth advisors, philanthropic advisors, attorneys, accountants, family office professionals, foundation leaders, and charitable organization representatives.

7. How will working groups be organized? Participants will engage in facilitated, cross-disciplinary discussions organized around key questions and challenges facing the field. Participants will select their preferred working groups at registration, and will receive descriptions of the working groups before the Summit.

8. **Why Daylight?** Daylight is advancing philanthropic advising through professional education, research, practical frameworks, and a growing practitioner community. Our work includes the Certified Impact Philanthropy Advisor (IPA) program and specialized professional certificates. In August 2026, 970 professionals completed Daylight's Essentials of Modern DAF Advising Certificate through the DAF500 Challenge. Across our educational programs, Daylight has served more than 2,100 learners.

Join Us in Shaping the Future of Philanthropic Advising

Become a sponsor of the Daylight Summit and help advance a collaborative effort to strengthen the field. To discuss sponsorship opportunities or confirm your participation, contact info@daylightadvisors.com.