

PHILANTHROPIC PLANNING WITH WOMEN CERTIFICATE

Today, women control over \$10 trillion, a third of US household financial assets. By 2030, they will control \$34 trillion in financial assets as part of the Great Wealth Transfer. As women become more active in financial decision-making, understanding their goals and investment preferences is a business imperative. As clients, women are more likely to donate to charities, want to involve their families in philanthropy, and invest in social and environmental impact goals.

In this certificate, you'll gain insights into the differentiated needs, preferences, and behaviors of women in managing their finances and how those decisions are reflected in their philanthropy and social impact goals.

53% of female-controlled assets are unmanaged, compared to 45% for men. This represents a **\$10 trillion opportunity** for firms recognizing female investors' unique goals and preferences.

The new face of wealth: The rise of the female investor, McKinsey, 2025

LEARNING OBJECTIVES

- Understand the life events and motivations that influence women's philanthropic journeys, and how advisors need to adjust their approach and practices accordingly.
- Evaluate the strategy, tools, and funding options to support women as clients in maximizing their impact.
- Develop culturally competent approaches to advising women across diverse backgrounds.

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By 2030, women will control over \$34 trillion in wealth and are increasingly using it to align money with meaning.

This course gives advisors the insight and tools to build respectful, values-driven relationships that reflect how women give, invest, and lead.

—Erin Hulme



MODULES

- Planning for the New Majority in Wealth
- Life Events that Impact Giving
- Financial, Estate and Philanthropic Planning
- Planning and Engaging with Purpose
- Investing for Impact
- Strategy to Execution

FACULTY



Erin Hulme is an independent philanthropy advisor with over 20 years of experience guiding philanthropists and nonprofit organizations in strategy development, resource mobilization, and the creation of high-impact partnerships. Her background includes leading the philanthropy team at the WHO Foundation and advancing gender-lens giving, collaborative philanthropy, and cross-border funding initiatives as part of the Philanthropic Partnerships team at the Bill & Melinda Gates Foundation.



Bleu Blakslee
Philanthropic Strategist



Darley Tom
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FEATURED INDUSTRY PRACTITIONERS

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Hali Lee
Heather McLeod Grant

COURSE FORMAT

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

Daylight is an approved CE sponsor. Continuing education credits are eligible for completion of the Philanthropic Planning with Women Certificate.

CFP®, CPWA®, CIMA®, RMA®: 6.5 hours
CAP®, CFRE, CSPG^{CM}: 6.5 hours

Register for the [Philanthropic Planning with Women Certificate](#) or an [Annual Certificate Subscription](#) now!