

CERTIFICATE OFFERINGS

Daylight's certificate programs are built for advisors in wealth management who want to deepen their expertise and confidently address clients' most complex planning challenges. These programs help you stay ahead of industry trends, deliver greater value, and continue growing as a trusted advisor.

Program benefits include:

- **Flexible online learning:** Complete coursework at your own pace, on your own schedule.
- **Targeted and practical content:** Focus on technical topics or specialized market segments that directly support your practice.
- **Continuing education credits:** CE available for IPA, CFP®, CPWA®, CIMA®, RMA®, CAP®, CSPG^{CM}, and CFRE.
- **Professional recognition:** Earn a certificate that demonstrates your expertise and commitment to excellence—ideal for sharing with clients or adding to your professional profile.
- **Cost effective:** Unlock all certificate programs with one low annual subscription fee.

79%

of investors agree they would be much more loyal to a financial advisor who actively helps them invest in a way that also has positive impact on the world.

Source: Nuveen's Sixth Annual Responsible Investing Survey

OUR CERTIFICATES

BUILDING A FOUNDATION:

Introduction to Philanthropic Planning Certificate (Complimentary for all Advisors)

Build a foundation in philanthropic planning with the vocabulary, frameworks, and tools to help clients clarify their purpose and align giving with their values. Explore Daylight's Philanthropic Advising Competency Model, the nine components of philanthropic planning, and common approaches to giving.

Essentials of Modern DAF Advising Certificate

Understand how donor-advised funds work, how sponsors differ, and how their policies and limitations affect client choices. This unconflicted certificate helps advisors assess the role DAFs can play within broader philanthropic and financial planning strategies.

APPLY IT IN PRACTICE:

Behavioral Philanthropy Certificate

Developed with [ideas42](#), this certificate applies behavioral science to the decisions people make about giving. Learn how psychological, social, and family dynamics shape donor choices and how to help clients work through common barriers.

Philanthropic Planning with Women Certificate

Explore how women's financial choices, priorities, and relationships can shape philanthropic planning. Learn to ask better questions about giving, family participation, and social impact while tailoring advice to each client's goals.

Philanthropic Planning with Business Owners Certificate

Learn how business ownership affects philanthropic planning, from the assets available for giving to decisions made before, during, and after an exit. Explore personal and corporate philanthropy so you can help owners connect business transitions with their giving goals.

Collaborative Philanthropy Certificate (Included with Certified IPA Program)

Developed with [Philanthropy Together](#), this certificate examines how donors combine knowledge, resources, and decision-making to pursue shared goals. Explore giving circles, collaborative funds, and practical ways to discuss collective giving with clients.

DEVELOP SPECIALIZED EXPERTISE:

Impact Investing Certificate

Learn the language, vehicles, and key considerations of impact investing so you can discuss strategies that seek financial returns alongside measurable social or environmental outcomes. Examine how impact investments can fit within a client's broader philanthropic and financial plan.

Charitable Planning for Wealth Advisors Certificate (Coming Soon)

This certificate helps advisors connect a client's charitable goals with their financial, tax, and estate plans. Learn how to evaluate a gift's assets, recipients, timing, and structure; collaborate with specialists; and revisit the plan as circumstances change.

Advanced DAF Certificate (Coming Soon)

Building on the essentials, this certificate examines complex assets, tax and estate planning, global giving, and impact investing. Learn how to assess sponsor capabilities and limitations, coordinate with specialists, and address more complex DAF decisions in a client's broader philanthropic plan.

	Individual Certificate	Annual Certificate Subscription (Access all certificates for 12 months)
Nonprofit & Independent Practitioner	\$700	\$1,400
For Profit	\$800	\$1,500

Looking to elevate your team's capabilities?

Ask us about our enterprise learning packages.