



Your learning partner for growth and impact.

Dear Friends,

As philanthropy continues to evolve, advisors are being asked to navigate increasingly complex conversations—from donor-advised funds and impact investing to family governance and charitable legacy planning. This month, we're focused on practical education that helps advisors meet those expectations with greater confidence. In this issue, you'll learn about the launch of the DAF500 Challenge, explore new educational resources, and see how members of the Daylight community are advancing the profession through their work.

Coming August 1: The DAF500 Challenge

Donor-advised funds (DAFs) are one of the fastest-growing charitable planning tools. However, many advisors never received objective, practical education on when DAFs are—and are not—the right solution for a client. As a result, clients may miss opportunities to align their giving strategies with their broader financial and philanthropic goals.

On August 1, Daylight will launch the **DAF500 Challenge**—one of the largest coordinated learning initiatives in philanthropic advising we've ever seen. Our goal is to recruit at least 500 advisors in August who are committed to raising the standard of modern DAF advising. Together, this community will demonstrate what is possible when hundreds of advisors build shared knowledge around this flexible philanthropic planning tool.

Participants will gain insights into navigating the evolving DAF industry, evaluating when and how DAFs fit into a client's planning goals, and assessing when another vehicle may be more appropriate. Through **complimentary** access to Daylight's **Essentials of Modern DAF Advising Certificate**, participants will earn 2 CE credits and receive 10 downloadable advisor resources, including the *DAF Succession Decision Framework*, *Questions to Ask DAF Sponsors*, and *How to Decide Between a DAF and a Private Foundation*.

Developed independently of any DAF sponsor, the certificate equips advisors with practical, unconflicted education they can apply immediately. When advisors better understand donor-advised funds, they can help clients make more thoughtful, strategic, and effective philanthropic decisions.

Registration opens August 1. We encourage you to complete the certificate by August 31 to be part of the first 500 advisors helping shape the future of modern philanthropic advising.

Nominate a leader for the 2026 DAF Giving Summit Awards

Did you—or someone you know—help catalyze a transformational gift, launch a groundbreaking partnership, develop an innovative advising strategy, or advance philanthropy in a meaningful way over the past year?

If so, we encourage you to submit a nomination to the [2026 DAF Giving Summit Awards](#) and help us celebrate excellence, innovation, and impact across the DAF ecosystem.

Leading the Way

Learning doesn't end with a certificate. Across philanthropy, wealth management, and social impact, Daylight learners are contributing new ideas, publishing research, and advancing professional practice.

- Cara Binder-Kopchick, IPA, authored NCFP's [A Guide to Meaningfully Engaging Next-Generation Adults in Your Philanthropy](#).
- Elaine Chu, IPA, authored [Raising Future Philanthropists: 5 Steps to Instill Positive Values in Your Teens Through Service and Granting](#).
- Jilla Tombar, IPA, is featured in the Chronicle of Philanthropy article, [Are Wealthy Donors Giving Big Again? Yes. But it's Complicated](#) (subscription required).
- Rebecca Darwent, IPA, is launching [Wealth Currents](#), a quarterly publication for women coming into significant wealth.
- Juliet Valdinger, IPA, featured in CityWealth article, [The Business of Philanthropy: Why Philanthropy Is Becoming Part of Private Mainstream Private Banking](#).

Advance Your Practice

As more clients seek to align their investments with their values, advisors are looking for practical guidance. The same conversations that are changing philanthropy are also changing investing. According to the 2026 TPI Study of the Philanthropic Conversation, 85% of advisors plan to increase their knowledge of philanthropy, with impact investing ranking as the top area of interest (53%).

Daylight's [Impact Investing Certificate](#) equips advisors with practical frameworks for integrating impact investing into client conversations, evaluating strategies across asset classes, and aligning investments with philanthropic goals. We've also added a new module on *Impact Investing Through Donor-Advised Funds*, providing practical guidance for one of the field's fastest-growing applications. Explore the certificate and build your expertise in this emerging practice area.

Connect With Us

- [Wealth Management Industry Awards](#), Sept 10, New York City. Daylight is a finalist in the Philanthropy category; Dien Yuen, our CEO, is a finalist in the CEO of the Year (Professional Service Firms).
- [DAF Giving Summit](#), September 23-25, Austin, TX. Tony Macklin, IPA, and Dien Yuen, IPA, will lead an interactive lab session.
- [Charitable Gift Planners \(CGP\) Annual Conference](#), October 14-16, New Orleans. Bleu Blakslee, IPA, and Dien Yuen, IPA, will share the Fraye Family Case Study.

Thank you for being part of a growing community of advisors shaping the future of philanthropic advising.

Your learning partner,

Team Daylight

Daylight

Your learning partner for growth and impact.

