

# DAYLIGHT OVERVIEW

Amidst a historic intergenerational transfer of wealth, clients are turning to advisors for more than investment and tax planning, and philanthropy's tools, considerations, and goals have become more complex. It's a transformative era for wealth and philanthropy, requiring new competencies and networks to thrive.

Daylight's learning platform is exclusively designed for wealth and philanthropic advisors to help you meet this extraordinary opportunity to grow your business, client relationships, and impact.

Our programs give advisors the confidence, competence, and cultural dexterity to modernize their philanthropic advising practice. The <u>Certified Impact Philanthropy Advisor</u> (IPA) program and segment <u>certificates</u> establish a new benchmark for excellence in philanthropic advising training, while the Impact Advisor Network (IAN) supports a thriving community of practitioners. The <u>Daylight Philanthropic Advising Competency Model</u> is the first field-informed framework that outlines the knowledge, skills, and behaviors advisors need to serve clients and communities today.

# Daylight: Modern Philanthropic Advising Training

### **Empower**

practitioners with contemporary and accessible learning opportunities.

### Connect

advisors, and organize and elevate the philanthropic advising profession.

## **Understand**

the sector better with new research on philanthropic influence.

### **Boost**

the capacity of organizations, as well as advisors, with specialized expertise and services.

#### **Outcomes**

- Expanded consumer participation
- Trust and visibility in the field
- More qualified impact advisors
- New leadership and voices
- · Global network of advisors
- New collaborations, partnerships

#### **Impact**

- New philanthropy
- · New families and participants
- Diversity of causes and communities supported
- New philanthropic practices and innovation

## **Daylight's Milestones**

2024

Feb | Launched the industry's first philanthropic advisor entrepreneur accelerator

Apr 🍦

Released the first comprehensive survey of philanthropic advisors: U.S. Philanthropic Advisors Report

Sept 🔷

Released our podcast, <u>Illuminate</u> Philanthropy

<u>Certified Impact Philanthropy Advisor</u> (IPA) program launched

2025

Feb

Inaugural IPA cohort graduation

Mar

**Behavioral Philanthropy Certificate** launched

Impact Advisors Network (IAN) went live

June

Collaborative Philanthropy and Impact **Investing Certificates launched** 

July

Daylight published the industry's first Philanthropic Advising Competency Model

Sept

<u>DAFopedia</u>, curated resource for advisors on DAF giving launched

Oct

5th IPA cohort; 354 learners enrolled in IPA since inception

Nov

Philanthropic Planning with Women and **Business Owners Certificates** launched

"IPA gave me the confidence to own my lane as a philanthropic advisor. I walked away with tools I could use the next day, a better sense of my strengths, and clarity on when to call in backup. It didn't just sharpen my technical skills—it affirmed my voice and my value in this field."

> - Jilla Tombar, IPA BlackBridge Philanthropic

> > 200

Certified Impact Philanthropy Advisors

354

Daylight Learners

25

# of IPA Groups

25

Community foundations represented

"I recommend Daylight's programs because they move beyond theory into real philanthropic practice. The IPA program pushed me to rethink how community foundation leaders guide donors—not just in transactions, but in purpose, values, and lasting impact. Daylight has accelerated my learning and confidence as a new community foundation CEO."

> - Erik Rankin, IPA Illinois Prairie Community Foundation