



PHILANTHROPY
ADVISOR

Powered by Daylight

A NEW STANDARD FOR IMPACT

THE IMPACT PHILANTHROPY ADVISOR CERTIFICATION

Amidst a historic \$124 trillion intergenerational transfer of wealth, clients are turning to advisors for more than investments and tax planning, and philanthropy's tools, considerations and goals have become more complex.

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

With a mix of expert facilitation and on-demand instruction available online over 20 weeks, the Impact Philanthropy Advisor program (IPA) offers the skills and connections to confidently support the needs and expectations of families, organizations and communities today.

Net Promoter Score

Our IPA program received a **world-class rating** that reflects the strength of our learning community.

NPS
83

"Consider **the IPA Certification a launching pad** to elevate and strengthen one's confidence in being able to better serve those they're called to guide. I'm excited about the domino effect that will be felt throughout time by the advisors and consultants who lean into the wisdom that is collectively shared here."

Padric H.B. Scott
Founder & CEO,
Crossroad Capital Partners



THE IPA EXPERIENCE

623

**IPA
Learners
Enrolled**

494

**Certified
IPAs**

97%

**Graduation
Rate**

50

**Community
Foundations
Represented**

16

**Countries/
Regions**

The IPA certification is a state-of-the-art learning program.

**IPA
participants
will receive**

- **20 weeks of learning** designed by expert advisors
 - **On-demand content** and case studies
 - **Live group discussions** facilitated by industry practitioners
 - **New peer connections**
 - **Continuing education** credits
 - **Celebrations and virtual graduation**
- **One year access to the** [Impact Advisors Network](#)
- **Complimentary access to** [Collaborative Philanthropy Certificate](#)

HOW IPA BUILDS PROFESSIONAL COMPETENCE

IPA develops competence across three interconnected dimensions

TECHNICAL

- Assess charitable and non-charitable giving strategies and structures
- Integrate philanthropic considerations with wealth, tax, and estate planning
- Evaluate giving vehicles, assets, and approaches in relation to client goals

RELATIONAL

- Integrate knowledge and judgment in complex client situation
- Elicit client values, motivations, priorities, and definitions of impact
- Facilitate effective philanthropic conversations among clients, families, and advisors

APPLIED

- Translate client goals into appropriate philanthropic strategies and next steps
- Apply knowledge and judgment to complex, client situations
- Recognize ethical considerations, professional boundaries, and limits of expertise

WHO NEEDS TO BE AN IPA?

Whether in a wealth management firm, DAF sponsor or community foundation, family office, grantmaker or nonprofit, many roles benefit from fluency in philanthropy.

IPA is for:

- **Client-facing advisors** and team members, to better understand your clients and their families, the options available to them, and to collaborate with fellow advisors.
- **Business development roles**, to be nimble and opportunistic with the demands of U/HNW families today.
- **Planning and philanthropic specialists**, to support junior team members, and for advanced leaders to update their knowledge and be first to access new courses.
- **Associates interested in social change**, to further their career development and boost corporate loyalty and retention.



"Daylight offers a **comprehensive view of the field** along with **practical tools** to help shape your unique approach. In a space where formal certification has been lacking, Daylight is leading the way by helping professionals build core competencies and define their practice."

Jennifer Curry
Director of Giving Strategies,
Oregon Community Foundation



IPA MODULES

1. Fundamentals in Philanthropic Advising
2. Social Impact Landscape
3. Art of Philanthropic Advising
4. Purpose and Strategy
5. Charitable Tax Planning
6. Legacy and Gift Planning
7. Foundations and Donor Advised Funds
8. Impact Investing and Alternative Tools
9. Influence, Leverage, & Civic Action
10. Planning for the Future
11. Ethics in Philanthropic Advising
12. Cultural Dexterity

FACULTY INCLUDES



Aquanetta Betts
JD, AEP®, CAP®,
CFRE, IPA
Johnson Betts, LLC



Ginni Galicinao
ACFBA, ACFWA,
CAP®, CPCC,
ORSC, IPA
Dynamics of
Family Wealth



Seth Klukoff
IPA
Eoan Strategies



Mark Greer
MBA, CAP®, IPA
Phila Engaged
Giving



Beth Harper Briglia
CPA, CAP®, IPA
Philanthropic
Advisor

Successful completion of the IPA program provides 16 hours of eligible CE credit.

- CFP Board | Certified Financial Planner® (14.5 eligible hours)
- Investments and Wealth Institute | Certified Private Wealth Advisor®, Certified Investment Management Analyst®, Retirement Management Advisor®
- The American College of Financial Services | Chartered Advisor in Philanthropy®
- The American Institute for Philanthropic Studies, CSU Long Beach | Certified Planned Giving Specialist®
- Certified Fund Raising Executive International | CFRE

HOW IT WORKS

- About 30 hours, start-to-finish
- 12-15 advisors per cohort
- 12 self-paced modules
- 5 case studies
- 10 live virtual cohort conversations

FEES

For Profit Professionals:
\$2,850

Nonprofit &
Independent Practitioners:
\$2,500



REGISTER AT

www.daylightadvisors.com/impact-philanthropy-advisor
learn@daylightadvisors.com