

Certified Impact Philanthropy Advisor

Program Outline (Jan 2026)

The **Impact Philanthropy Advisor (IPA)** certification is a comprehensive, professional program designed to prepare advisors to meet the growing demand for sophisticated, values-aligned philanthropic guidance. The program integrates technical training, relational advising skills, and practical application to equip learners to serve a diverse and evolving client landscape.

Learning Objectives

By the end of this program, you will be able to:

- Diagnose and articulate client values, priorities, and motivations.
- Evaluate and compare the strategic uses, benefits, and limitations of charitable and non-charitable giving tools across diverse client scenarios.
- Integrate philanthropic strategies seamlessly into comprehensive wealth, estate, tax, and legacy planning to maximize client impact.
- Apply a cultural dexterity framework to engage effectively with clients across generations, identities, and cultural backgrounds.
- Apply the various donor impact journey frameworks and leverage behavioral insights to support clients' decision-making and engagement.
- Design sustainable philanthropic strategies that support clients' long-term goals while expanding advisory opportunities and relationships.
- Strengthen your advising style and communication techniques to foster deeper, more confident conversations about purpose, impact, and giving.
- Analyze current trends, debates, and shifts in the philanthropic landscape.
- Identify and navigate ethical obligations and dilemmas in philanthropic advising.

MODULES

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

Module 1. Fundamentals

1. Program Welcome and Module Overview
2. Setting Context
3. The Market for Philanthropic Services
4. The Ecosystem of Advising
5. Philanthropic Advising Services
6. Module Wrap-Up

Module 2. Social Impact Landscape

1. Module 2 Overview
2. The United Nations Sustainable Development Goals
3. The United States Social Sector
4. The U.S. Nonprofit Sector
5. Challenges and Challenging Norms in the Social Sector
6. Module 2 Wrap-up

Module 3. The Art of Philanthropic Advising

1. Module 3 Overview
2. What Role(s) Will You Play with Your Clients?
3. Challenging our Assumptions
4. Understanding the Client's Philanthropic Journey
5. Guiding the Philanthropic Journey
6. Module 3 Wrap-Up

Module 4. Defining Purpose & Strategy

1. Module 4 Overview
2. Let's Define Purpose
3. Let's Define Strategy
4. Trends in the Social Sector
5. Module 4 Wrap-Up

Module 5. Charitable Tax Planning in the U.S.

1. Module 5 Overview
2. Fundamentals
3. Gifts of Complex Assets
4. Fruit Salad
5. Applying Module 5
6. Module 5 Wrap-Up

Module 6. Legacy and Gift Planning

1. Module 6 Overview
2. Estate Planning
3. Bequests
4. Retirement Accounts
5. Life Insurance
6. Charitable Gift Annuities
7. Charitable Remainder Trusts
8. Charitable Lead Trusts
9. Applying Module 6
10. Wrap-Up

Module 7. Foundations and DAFs

1. Module 7 Overview
2. Public Foundations and Community Foundations
3. Donor-Advised Funds
4. Supporting Organizations
5. Private Foundations
6. Private Operating Foundations
7. Wrap-Up

Module 8. Impact Investing & Alternative Tools

1. Module 8 Overview
2. Impact Investing
3. Charitable LLCs
4. Purpose Trusts
5. Purpose-Led Businesses
6. Module 8 Wrap-Up

Module 9. Influence, Leverage & Civic Action

1. Module 9 Overview
2. Influence Strategies
3. Leverage Strategies
4. Civic Action Strategies
5. Applying the Strategies
6. Module 9 Wrap-Up

Module 10. Planning for the Future

1. Module 10 Overview
2. Planning for Change
3. Your Future Philanthropic Advising

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4. Working Within the Ecosystem of Advisors
 5. Module 10 Wrap-Up

Module 11. Ethics in Impact & Philanthropic Advising

1. Ethics Module Overview
2. Responsibility to Yourself
3. Responsibility to Your Client
4. Responsibility to the Community
5. Responsibility to the Profession
6. Ethics Module Wrap-Up

Module 12. Cultural Dexterity & Philanthropic Planning

1. Introduction
2. Cultural Competency
3. Global Dexterity
4. Cultural Dexterity & Philanthropic Advising
5. Cultural Dexterity Module Wrap-Up
6. IPA Program Wrap-Up