

# Daylight

Revealing a greater impact

Hello Friends,

As we head into the giving season and a new year of growth, it's the perfect time to use your remaining professional development budget to enhance your skills in our new certificate programs or become a Certified [Impact Philanthropy Advisor](#)!

Register for the January or April [Impact Philanthropy Advisor](#) cohorts to showcase your expertise as a Certified Impact Philanthropy Advisor and deliver more value to your clients and givers. IPA sets a new standard for impact advising, giving you the confidence, competence, and cultural dexterity to serve clients and givers better. Previous cohorts include philanthropic advisors, wealth advisors, attorneys, gift planners, and development professionals. Take advantage of the \$250 discount, which ends on January 10th!

We're launching six new certificates in 2025. These programs allow you to go deeper into technical or market segment-specific topics and areas. Designed to help advisors like you address the shifting needs of clients and donors, certificates have five modules and can be completed in as little as eight to ten hours online.

Our first certificate launch is the Behavioral Philanthropy Certificate in partnership with [ideas42](#)! This certificate offers advisors a unique opportunity to deepen their understanding of how behavioral science and philanthropic advising intersect. You will explore the psychological factors influencing donor behavior, donor barriers, decision-making processes, and the impact of social and family dynamics on philanthropic giving.

Future certificates include the Impact Investing Certificate, Collaborative Giving Certificate, Philanthropic Planning with Business Owners, Philanthropic Planning with Women, and Philanthropic Planning with LGBTQ+ Clients.

As industry practitioners, we remain [in the field](#), both online and in person. Find us at a conference, connect with us on [LinkedIn](#), or follow us on [Instagram](#) and [Bluesky](#)!

In appreciation of your partnership,

Team Daylight  
[learn@daylightadvisors.com](mailto:learn@daylightadvisors.com)

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## A New Partner in the Planned Giving Community



Daylight is expanding learning opportunities for the planned giving community through our new partnership with Giving Docs. Giving Docs helps nonprofits amplify their planned giving programs by creating a seamless process for donors to move from intention to documentation using its suite of comprehensive estate planning and giving tools. Our partnership will offer Giving Docs' clients access to Daylight's certified Impact Philanthropy Advisor and certificate programs for a special rate to learn the skills to deepen donor relationships. Daylight learners will receive a special rate to access the Giving Docs platform for their nonprofits. To learn more, contact Megan Bell at [megan@daylightadvisors.com](mailto:megan@daylightadvisors.com).

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### Meet a Learner from our IPA Inaugural Cohort

*"I pursued the IPA program to strengthen my work in guiding clients to design philanthropic strategies that drive measurable change."*

Sharmila Rao Thakkar is an independent philanthropic advisor and founder of SRT Advising & Consulting, working primarily with individual donors and multigenerational families. With over 25 years of experience in the field, her background includes leadership roles in a family foundation, local nonprofits, and public health communications. She has a deep interest in giving among the South Asian community and centers her practice around helping leaders align their vision and values.



"My experience with the IPA program so far has been inspiring and empowering. It's been an invaluable resource, offering critical insights, practical frameworks, and an incredible network of like-minded professionals dedicated to truly better serving clients committed to maximizing their social impact."

**Sharmila Rao Thakkar,**  
MPH, MPA, CAP



## In the Field: Where to Find Us

### NOVEMBER

- [Hawaii Tax Institute](#) in Hawaii (Nov 3 - 7)
- [Post-Election Webinar](#) Virtual (Nov 7)
- [Greater Washington Community Foundation](#) in Washington DC (Nov 13)
- [UHNW Institute](#) in NYC (Nov 13 - 14)
- [AIP Conference](#) in San Jose (Nov 13 - 15)
- [Schwab Impact 2024](#) in San Francisco (Nov 19 - 24)

### DECEMBER

- [Southern Arizona Estate Planning Council](#) in Tucson (Dec 11)
- [ThinkAdvisor Luminaries Awards](#) in Las Vegas (Dec11)

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### Daylight Partners



## Daylight

[Daylight](#) is a global professional development community for philanthropy and social impact. Together with advisors and families, we support the practices and networks to maximize philanthropy's potential for transforming lives.



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