

Daylight

Revealing greater impact

Welcome to 2025 and the Year of the Wood Snake.

Team Daylight is gearing up for an exciting year ahead! In 2025, we're launching six new certificates, four Impact Philanthropy Advisor (IPA) cohorts, and welcoming the inaugural group of learners into our Impact Advisors Network (IAN). We're also setting our sights on surpassing the 57 presentations and gatherings we hosted in 2024.

Philanthropy is more important than ever to client relationships, building your business and supporting our communities. Whether you are a philanthropic specialist or a wealth advisor who knows that charitable planning is key to growth, Daylight helps you make the most of these opportunities.

As you kick off the new year, we invite you to reflect on these key questions:

- What new questions can I ask clients about generosity, purpose, and impact?
- What new philanthropic advising competencies should I develop to lean into that clients will need next?
- What specialists will my clients need in the next three years, and do I have enough qualified referrals to provide?

We are deeply grateful to everyone who brings this special network to life: our new IPAs, certificate subscribers, and the Daylight team, faculty, Board, and Advisory Board. We invite you to join us!

With appreciation,

Team Daylight
learn@daylightadvisors.com

Behavioral Philanthropy Certificate Launching Soon

The logo for ideas42, featuring the word "ideas" in white lowercase letters and the number "42" in white inside a green circle, all set against a dark blue semi-circular background.

ideas⁴²

Behavioral Philanthropy Certificate

The logo for Daylight, featuring the word "Daylight" in white lowercase letters with a yellow dot above the "i", all set against a dark blue semi-circular background.

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Registration now open!

The [Behavioral Philanthropy Certificate](#), created in partnership with [ideas42](#), 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.

Ready to dive into the program? [Registration](#) is now open! Take advantage of an annual subscription to access all six certificates offered this year. Special pricing is also available for a limited time for both the Certified Impact Philanthropy Advisor program registration and the annual certificate subscription.

Meet a Learner from our IPA Inaugural Cohort

[Zakiya Johnson Lord](#) serves as the Regional Philanthropic Director at the Movement Voter Project. She works with high-net-wealth individuals to identify and strategize ways that they can build their legacies and have an impact through the mobilization of resources. Zakiya is among the learners bringing unique perspectives and practical experiences to the growing Impact Philanthropy Advisors' community.



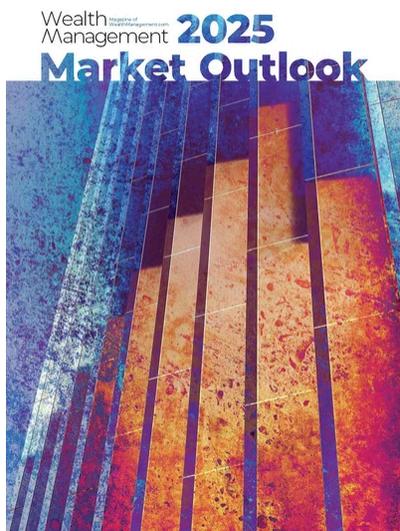
PHILANTHROPY ADVISOR

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A NEW STANDARD FOR IMPACT

"My experience with the IPA program so far has been generative, and grounding. The content has been immediately applicable, as well as affirming. The frameworks have provided context, and the regular interactions with other cohort members, have proved to be a welcomed space to gain insights and perspective from seasoned, dedicated peers."

Zakiya Lord



Advising the Modern Philanthropic Client

Advisors equipped with the skills and expertise to navigate the ever-evolving social impact landscape are better positioned to earn the trust of today's philanthropic clients.

In their latest article, *Advising the Modern Philanthropic Client*, featured in WealthManagement.com's *2025 Market Outlook*, Tony Macklin and Dien Yuen explore emerging opportunities for advisors in this dynamic field.

Illuminate Philanthropy

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Join Dien Yuen and Meg Bell for the grand finale of our series, [The Messy Marketplace](#), as part of *Adapting to 8 Trends in Philanthropic Advising*. Dien will share her insights on the surge of private capital and its transformative impact on the philanthropic landscape.

Don't miss this opportunity to reflect on the trends we've explored throughout the series and get excited for an all-new series launching in February.

- Episode 1: [Changing Client Base](#)
- Episode 2: [Evolving Definitions](#)
- Episode 3: [Evolving Vehicles](#)
- Episode 4: [Questioning Norms](#)
- Episode 5: [Growing Mistrust](#)
- Episode 6: [Wealth Planning](#)
- Episode 7: [AI for Good](#)
- Episode 8: [The Messy Marketplace](#)

A New Partnership to Expand Philanthropic Planning Education for Financial Advisors

chip

Changing How Individuals Prosper

CHIP is a financial services marketplace dedicated to connecting individuals with financial professionals of color. By offering a platform for finding experts in philanthropic, wealth, and estate planning, CHIP empowers consumers to build their financial team with confidence and control over their financial futures.

Daylight is pleased to partner with CHIP (Changing How Individuals Prosper) to provide our philanthropy learning stack to their marketplace of financial advisors at a discounted rate. IPA graduates receive discounted access to CHIP membership. To learn more about Daylight's partnerships, contact Megan Bell at megan@daylightadvisors.com.

In the Field: Where to Find Us

JANUARY

- [Hampton Roads Estate Planning Council](#) in Virginia Beach (Jan 21)
- [TIFIN Give Webinar](#) Virtual (Jan 22)
- [WOC Learning Lab: Getting to Give](#) Virtual (Jan 23)

FEBRUARY

- [IDPC Meeting](#) in New Orleans (Feb 19-21)

MARCH

- [Hawai'i Gift Planning Council](#) in Honolulu (March 6)
- [Washington Planned Giving Council](#) in Seattle (March 10)
- [AdNet 2025](#) in Atlanta (March 24-26)

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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