INTRODUCTION TO PHILANTHROPIC PLANNING CERTIFICATE

The Introduction to Philanthropic Planning Certificate offers a quick, practical entry for professional advisors and philanthropic leaders who are increasingly called upon to help clients or donors give effectively. Wealthy clients now expect guidance beyond technical solutions, and younger generations are seeking clarity around purpose and impact while using tools beyond tax-deductible gifts. Advisors willing to facilitate conversations about modern philanthropy will have the edge in client attraction and retention during the historic transfer of wealth.

This Certificate is designed for wealth advisors, private client attorneys, CPAs, trust officers, family office staff, and nonprofit professionals seeking a fundamental baseline or refresh in philanthropic advising. It provides essential vocabulary, frameworks, and conversational techniques to clarify and support clients' decisions about purpose, giving, and social impact.

LEARNING OBJECTIVES

- Explain the knowledge and skills required for effective advising within the Philanthropic Advising Competency Model.
- Describe the nine components of modern philanthropic planning, including representative client deliverables.
- Explain the fundamentals of the modern social impact toolkit, including donor-advised funds, private foundations, and emerging structures and trends.
- Apply conversation prompts to lead discovery discussions that surface client values, purpose, and legacy goals.
- Predict how the advisor's role will evolve as a collaborator with others across the stages of developing and implementing philanthropic plans.

MODULES

- Laying the Groundwork
- Preparing for Meaningful Impact

COURSE FORMAT

Program Type: Certificate program - asynchronous course with module quizzes
Program Delivery: Readings, videos, graphics, downloadable resources
Program Complexity Level: Overview

Daylight is an approved CE sponsor. Continuing education credits are eligible for completion of the Introduction to Philanthropic Planning Certificate.
CFP®, CPWA®, CIMA®, RMA®: 2 hours
CAP®, CFRE, CSPG℠: 2 hours

Introduction to Philanthropic Planning Certificate is complimentary for all advisors.
Registration coming soon.