

ESSENTIALS OF MODERN DAF ADVISING CERTIFICATE

Donor-advised funds (DAFs) are among the most widely used and flexible philanthropic vehicles available to donors and their advisors. Their rapid growth has expanded the range of donors they serve, the charitable strategies they support, and the sponsoring organizations that offer them. At the same time, DAFs have generated confusion, misconceptions, and ongoing debate among advisors, nonprofits, policymakers, and the public.

The certificate provides a practical, unconflicted introduction to today's DAF landscape. Learners will gain a clear understanding of how DAFs work, the sponsor ecosystem, common planning opportunities and limitations, and the role DAFs can play within broader philanthropic and financial planning strategies. They will also explore many ways to thoughtfully incorporate DAFs into client engagements.

Designed primarily for wealth advisors, attorneys, CPAs, trust officers, family office professionals, and philanthropic advisors, the program may also benefit development professionals and nonprofit leaders seeking a deeper understanding of DAFs. However, it is not designed to train nonprofit professionals to raise funds from DAFs.

MODULES

- The Modern DAF Landscape
- Effectively Incorporating DAFs into Planning

LEARNING OBJECTIVES

- Explain how DAFs operate from legal, structural, and practical perspectives.
- Recognize the range of clients and philanthropic situations for which a DAF may be appropriate.
- Evaluate DAF sponsors based on a client's goals, preferences, and planning needs.
- Identify opportunities and limitations when incorporating DAFs into philanthropic, financial, tax, and estate planning.
- Use effective conversation prompts to help clients clarify their philanthropic goals and determine whether a DAF is an appropriate solution.

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 Essentials of Modern DAF Advising Certificate.

IPA, CFP®, CPWA®, CIMA®, RMA®, CAP®, CFRE, CSPG^{CM}: 2 hours

Register for the [Essentials of Modern DAF Advising Certificate](#) or an [Annual Certificate Subscription](#) now!