

# Daylight

Your learning partner for growth and impact.

This month, we're sharing resources to help you bring new ideas into your philanthropic planning practice.

## New Tool: Charitable Planning Landscape Map

Who needs to be involved in a charitable plan, and when? Daylight's new [Charitable Planning Landscape Map](#) provides a one-page view of the professionals, services, and resources that support the work across four stages:

- Engage and Discover
- Advise and Design
- Structure and Implement
- Administer and Steward

[Download](#) and use it to orient a new team member, identify resources for a client's situation, or discuss where additional expertise is needed.

This tool is part of our [Charitable Planning for Wealth Advisors Certificate](#), launching in January 2027.

**Charitable Planning Landscape:** Representative organizations, services, and resources across the charitable planning ecosystem.

|                      | Engage & Discover                      | Advise & Design                                                  | Structure & Implement                                                                                                                                            | Administer & Steward                           |                          |
|----------------------|----------------------------------------|------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|--------------------------|
| Donors and Families  | <b>Marketing</b><br>                   | <b>Gift Planners, Professional Advisors, and Consultants</b><br> | <b>Gift Vehicles &amp; Structures</b><br>Bequests, CGAs, CRTs, CLTs, DAFs, private fdtns, life insurance, retirement assets<br><b>Complex Asset Services</b><br> | <b>Gift &amp; Bequest Administration</b><br>   | Charitable Organizations |
|                      | <b>Prospect Research</b><br>           |                                                                  |                                                                                                                                                                  |                                                |                          |
|                      | <b>Estate Planning Platforms</b><br>   |                                                                  | <b>Art &amp; Collectibles</b><br>                                                                                                                                | <b>Trust, Custody, Investment Services</b><br> |                          |
|                      | <b>Legacy Campaigns</b><br>            | <b>Planned Giving Software</b><br>                               | <b>Real Estate</b><br>                                                                                                                                           | <b>Appraisals</b><br>                          |                          |
| Field Infrastructure | <b>Education &amp; Credentials</b><br> | <b>Events &amp; Conferences</b><br>                              | <b>Professional Associations</b><br>                                                                                                                             | <b>Media &amp; Research</b><br>                |                          |

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Categories and organizations are representative and illustrate the structure of the charitable planning field. The landscape is not exhaustive, and inclusion does not constitute an endorsement. For a landscape of donor-advised funds, see Gideon Taub's [DAF Landscape Map](#). © 2026 Daylight Advisors, Inc. All rights reserved.

## New Insights: Daylight at the DAF Giving Summit

Making high-quality learning accessible is a core commitment at Daylight. We brought together a team of contributors at the DAF Giving Summit to share highlights from the sessions and conversations with practitioners.

Explore session recaps and insights on [DAFopedia](#), whether you joined us in Austin or are catching up from afar.

Thank you to Certified IPAs [Crystal Thompkins](#), Christina Gorczynski, Shannon Stagner, Sarah Taylor, and Jordan Richardson for sharing their time and perspectives with the broader advising community.

## Inside the Impact Advisors Network

The [Impact Advisors Network](#) (IAN) brings Daylight learners together to exchange tools, test ideas, and support one another's practice. Here's what's happening:

- [Shanon Salova, IPA](#), is bringing independent philanthropic advisor entrepreneurs together to help one another build sustainable businesses.
- [Shiloh Turner, IPA](#), will share lessons from her Fulbright teaching experience in Central Europe, exploring how culture and context shape generosity and civic participation. She invites learners to consider how curiosity and cultural humility can strengthen their advising.

In November, [Dianne Chipps Bailey](#) will join us to discuss the newly released [Bank of America Study of Wealthy Americans](#). We'll also preview Daylight's Philanthropic Advising Landscape Map and explore how philanthropic advising, philanthropic planning, and charitable planning relate to one another.

## Leading the Way

Across philanthropy, wealth management, and social impact, members of the Daylight community are contributing new ideas, publishing research, and advancing professional practice.

- Daylight CEO [Dien Yuen](#) has been named to the [2026 Forbes 50 Over 50](#) list.
- NAWRB will recognize two of our learners at its [Leadership Summit](#): Bleu Blakslee, IPA, as Nonprofit Leader and Rosser Goodman as Entertainment Leader.
- Congratulations to Jon Kraus, IPA, on being named the Colorado Planned Giving Roundtable's [2026 Volunteer of the Year](#).
- Birger Stampherdahl, IPA, CEO of Give2Asia, released a report examining the opportunities, misconceptions, and challenges shaping [impact investment funds across South-East Asia and China](#).
- Sharmila Rao Thakkar, IPA, and Ly Tran spoke in the session [From Aspiration to Action: A New Generation of Indian Diaspora Philanthropy](#) at the Indiaspora/India Philanthropy Alliance Summit.

## Learning in Practice with Advisor Teams

Daylight recently led an interactive session for the Cambridge Investment Research ESG Study Group, exploring how philanthropic planning connects with clients' investment goals. Through a mini case study, advisors considered the questions to ask when a client wants to contribute company stock to a donor-advised fund and align its investments with her values.

Interested in bringing practical philanthropic planning education to your advisor team? [Connect with us](#) to discuss your team's learning needs.

## Where We'll Be This Fall

- [Charitable Gift Planners \(CGP\) Annual Conference](#), October 14-16, New Orleans. Bleu Blakslee and Dien Yuen will present the Fraye Family Case Study, an interactive session exploring how culture, women's leadership, and multigenerational governance shape philanthropic planning.
- [Investments & Wealth Institute Experience](#), November 16-17, Scottsdale. Dien Yuen will present with Will Mucci of CapShift on The Advisor's Edge: Integrating Philanthropy, Impact Investing, and Wealth Strategy.
- [UHNW Institute Annual Symposium](#), November 16-17, New York City.

## Learning Opportunities and Deadlines

- Last day to register for the October 2026 [Certified IPA](#) cohort: October 9. Registration for the January 2027 Certified IPA cohort is also open.
- Certificates [info session](#): October 22 at 12 pm PT/ 3 pm ET.
- Certified IPA [info session](#): November 12 at 9 am PT/ 12 pm ET.

Thank you for learning with us and contributing to the practice of philanthropic advising.

Your learning partner,

Team Daylight



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