Daylight

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FOR IMMEDIATE RELEASE

Daylight Launches Complimentary Introduction to Philanthropic Planning Certificate for Advisors Amid Historic Wealth Transfer

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Berkeley, CA - February 16, 2026 - Daylight today announced the launch of the *Introduction to Philanthropic Planning (IPP) Certificate*, a new, complimentary, two-hour training program designed to help advisors respond to growing client demand for guidance around charitable giving, purpose, and legacy. The program officially opens on February 16, 2026, and is free to all enrollees.

The launch comes at a pivotal moment for the advisory profession. According to Cerulli Associates, an estimated $124 trillion is projected to transfer across generations through 2048 - one of the largest wealth shifts in history. As assets move to spouses, heirs, and charitable causes, clients are increasingly seeking advisors who can help them navigate not just technical planning, but meaning, impact, and long-term legacy.

About the IPP Certificate Program

Daylight's new certificate program is designed as a practical on-ramp for professionals who want to build confidence in these conversations quickly. While open to a wide range of professionals, the program is especially relevant for wealth management firms looking to provide a shared professional development experience across multiple advisors and client-facing teams.

"This is a defining moment for the advisory profession," said Tony Macklin, Director of Advisor Practice at Daylight. "As wealth moves across generations, clients are asking deeper questions about purpose, values, and what their wealth is ultimately meant to do. Advisors don't need to have every answer, but they do need the language, awareness, and confidence to enter those conversations thoughtfully. That's the gap this program is designed to help close."

The IPP Certificate can be completed in approximately two hours through two modules featuring short videos, curated readings, and practical tools. Participants gain a foundational understanding of modern philanthropic planning, including how to lead discovery conversations that surface a client's values and align them with appropriate philanthropic vehicles, strategies, and tactics. Continuing education credits will be available upon successful completion.

The program is designed for advisors new to philanthropic planning, as well as experienced professionals seeking a refresher. It serves financial advisors, attorneys, CPAs, trust officers, family office staff, and nonprofit professionals seeking a concise, practice-oriented foundation in philanthropic advising.

The program introduces participants to Daylight's Philanthropic Advising Competency Model and the fundamentals of the modern social impact toolkit, including donor-advised funds, private foundations, and emerging approaches to structured giving.

Daylight created the program in response to what it sees as a widening gap between rising client expectations and advisor preparedness. As families become more values-driven in their planning - and as next-generation and female wealth holders take on larger financial roles - philanthropic conversations are increasingly central to relationship building and long-term client retention.

"This isn't about adding complexity," Macklin added. "It's about helping advisors feel grounded enough to ask better questions, listen for what matters most, and support clients in shaping the impact they want to have."

The IPP Certificate also serves as an entry point into Daylight's broader educational pathway, offering advisors a structured first step before pursuing deeper credentials and advanced philanthropic planning training.

Registration

Registration opens February 16, 2026. Learn more and register here. Firms are encouraged to enroll teams of advisors to build a shared baseline of knowledge and confidence across their organization.

About Daylight

Daylight is a learning platform equipping wealth and philanthropic advisors with the confidence, competence, and cultural dexterity to thrive in their practice. Our Certified Impact Philanthropy Advisor (IPA) program and certificate offerings establish a new benchmark for excellence in philanthropic planning education.

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