Daylight

# Philanthropic Advising Learning Journey

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Advisors come to philanthropic advising from many professional paths, including wealth management, family offices, consulting, philanthropy, and impact investing. Despite their varied backgrounds, they share a common commitment to helping clients, families, and communities.

As client expectations rise and social impact tools evolve, effective philanthropic advising requires a broader, more integrated set of capabilities. To support advisors at every stage of development, Daylight created the Philanthropic Advising Learning Journey - a flexible framework designed to help advisors clarify where they are today and focus on what matters most next.

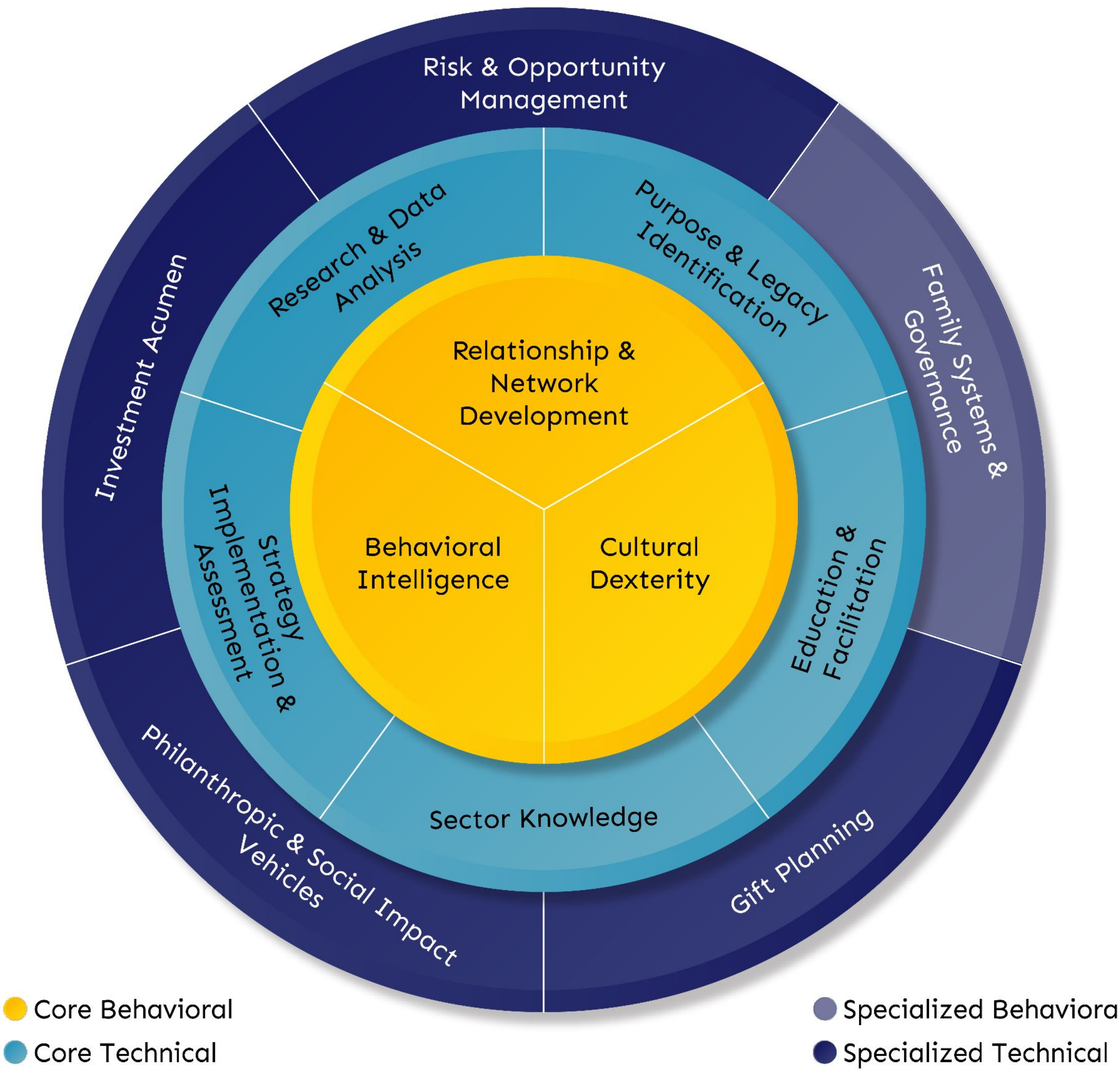
Grounded in Daylight's Philanthropic Advising Competency Model, the Learning Journey is organized around a set of advisor personas that reflect common roles, pressures, and growth moments. It is designed to be revisited over time, supporting continuous development as client needs evolve, careers progress, and responsibilities expand.

| **Integrators** | **Specialists** | **Refreshers & Shifters** | **Starters** | **Enterprise Managers** |
|---|---|---|---|---|
| Experienced professionals who want to sharpen their edge and stay ahead of evolving expectations of complex clients. | Experienced professionals with established practice areas looking to add new expertise to remain competitive. | Professionals building on past experiences and seeking state-of-the art content to meet current client trends. | Starters are new to philanthropic advising and eager to build a strong foundation in both the art and practice of the field. | Leaders who want to increase team competencies in social impact trends and conversations, while updating their own knowledge. |

Daylight's [Philanthropic Advising Competency Model]() outlines the knowledge, skills, and behaviors advisors need to serve clients and communities today. It categorizes 13 competencies as core or specialized, and behavioral or technical. However, firms may prioritize them in other ways.

For each competency, advisors and teams can assess their need for **conversancy** (familiarity with the topics), **proficiency** (ability to effectively work with the topics) or **expertise** (a high degree of mastery).

## Philanthropic Advising Competency Model



# Integrators

These experienced professionals seek to sharpen their edge and stay ahead of evolving client expectations. They often advise high-net-worth families, entrepreneurs, and institutions with complex goals and needs. They bring:

- Expertise in behavioral competencies.
- Proficiency across multiple technical competencies.
- Advanced professional credentials.
- Experience working with complex client situations.

To better serve clients, they're seeking:

- Expanded behavioral competencies.
- Conversancy or proficiency in additional technical domains.
- Team proficiency and access to expert collaborators across technical domains.

**Suggested Daylight learning pathways:**

- Certified Impact Philanthropy Advisor (IPA) program to integrate modern concepts into their advisory practice.
- Philanthropic Planning with Women for wealth transitions and shifts.
- Behavioral Philanthropy to understand the psychological factors influencing donor behavior, decision-making, and barriers.

Other resources: Purposeful Planning Institute or UHNW Institute to expand cross-disciplinary expertise and connections. Family Firm Institute or National Center for Family Philanthropy to deepen capabilities in family systems, governance, and dynamics.

**Jennifer**
**Wealth Advisor**
**Multi-Family Office**

As a CFP®, CAP®, and 21/64 Certified Advisor, Jennifer is adept in engaging her clients in meaningful discussions about charitable giving.

Her clients are now asking broader questions about family legacy, impact investing, advocacy, and other ways to achieve social impact.

*"I've grown a lot in this field, but I'm ready for more. I want to deepen my mastery and step into greater responsibilities, whether that's leading strategy, shaping client conversations, or mentoring others. Daylight helps me advance with purpose."*

# Specialists

Specialists are often mid- or senior-level advisors with established practices, or internal experts at foundations or family offices. They're respected for offering clients effective solutions and want to add new expertise to remain competitive. They bring:

- Proficiency or expertise in technical competencies.
- One or more advanced designations, credentials, or licenses.
- Confidence in client relationship management.

To better serve clients, they're seeking:

- Proficiency in serving specific client segments or in other technical competencies.
- Increased proficiency in behavioral competencies.
- Learning that can be quickly integrated into their practice.

**Suggested Daylight learning pathways:**

- Introduction to Philanthropic Planning Certificate.
- Philanthropic Planning with Business Owners Certificate.
- Impact Investing Certificate.
- Gift Planning Certificate.
- Advanced DAF Planning Certificate.

Other resources: Accredited Estate Planner (AEP®), Certified Specialist in Planned Giving (CSPG), and local planned giving and estate planning councils. Sustainable investing programs at US SIF or CFA Institute.

**James**
**Financial Advisor**
**Regional RIA Firm**

James has been a financial advisor for seven years. He has about 50 clients, many of whom are successful small business entrepreneurs. His clients are asking harder questions about charitable giving and legacy planning.

*"I know the basics—I'm here for depth. I'm looking for targeted content that sharpens my expertise in the specific areas where my clients need more from me. Daylight's niche certificates give me the depth and relevance I can't find anywhere else."*

# Refreshers & Shifters

Refreshers seek updated thinking and fresh perspectives after years of relying on legacy training or informal, on-the-job experience. Shifters enter philanthropic advising from adjacent professions. While both groups understand the fundamentals, client demographics, social impact tools, and cultural expectations have evolved significantly, requiring a recalibrated advisory approach. They bring:

- Expertise in one or more core technical competencies.
- Conversancy or proficiency in behavioral competencies.
- Understanding of the nonprofit and philanthropic sectors.

To better serve clients, they're seeking:

- Conversancy across additional technical domains to support effective collaboration.
- Proficiency with a broader range of social impact tools.
- Proficiency in working with a range of clients.

**Suggested Daylight learning pathways:**

- Certified Impact Philanthropy Advisor (IPA) program.
- Advanced DAF Planning Certificate and DAFopedia.
- Membership in the Impact Advisors Network (IAN) to connect with peers, exchange ideas, and access resources.

Other resources: 21/64 Advanced Trainings, Advisors in Philanthropy (AIP) membership, local estate and gift planning councils.

**Julio**
**Philanthropic Specialist**
**National DAF Sponsor**

Julio has been in his current role for over ten years. He is eager to bring fresh thinking to his growing portfolio of active donors and fund advisors.

*"I'm proud of the experience I bring, and I'm ready to renew my approach. I want contemporary insights that spark new thinking and keep my advising relevant and dynamic."*

**Mai**
**Gift Planner**
**Major University**

Mai spent 20 years as a gift planner. She is exploring a transition into a philanthropic advisor role at a wealth management firm.

*"I need practical tools, clear frameworks, and guidance grounded in real practice. Daylight gives me the confidence to navigate this shift and show up for clients in a meaningful way."*

# Starters

Starters are new to philanthropic advising and focused on building core knowledge, skills, and confidence. They are learning how to engage clients in meaningful conversations about giving, purpose, and impact. They bring:

- A graduate degree and/or fundamental professional designation in a related profession.
- Conversancy or proficiency in the technical competencies.
- Passion for giving, volunteering, and impact.

To better serve clients, they're seeking:

- Proficiency in the broader social sector beyond 501(c)(3)s.
- Proficiency in behavioral competencies (the 'art of advising').
- Networks that can expand their client or donor base.

**Suggested Daylight learning pathways:**

- Introduction to Philanthropic Planning Certificate.
- Certified Impact Philanthropy Advisor (IPA) as a structured, guided entry point and the Impact Advisors Network to broaden connections and perspectives.
- Certificate subscription to build targeted knowledge in supporting specific groups of clients.

Other resources: Advisors in Philanthropy (AIP), 21/64 Approach Training, DAF Giving Summit, DAFopedia, local estate and gift planning councils.

**Mike, New VP**
**Community Foundation**

Mike's finance background led him to roles at community banks, including managing employee giving programs. Motivated to share his enthusiasm for giving and volunteering, he recently joined a local community foundation.

*"I know so many active volunteers and donors. How can I help them have a bigger impact with their philanthropy?"*

**Tamika, Fundraiser**
**National Nonprofit**

Tamika has six years of successful fundraising experience and has earned her CFRE. She sees the opportunity to engage donors in deeper conversations.

"How can I become more comfortable asking people from different backgrounds about their purpose, wealth, and legacy?"

# Enterprise Managers

These executives oversee the development of advisors, teams, or entire organizations. They're responsible for creating consistency across advisory practices and ensuring their advisors have modern philanthropic advising fluency. From RIAs and multi-family offices to community foundations, they value Daylight's ability to deliver training that is relevant, flexible, contemporary, and aligned with today's client and donor demands.

To better serve clients, they're seeking:

- Increased organizational capabilities–a shared grounding in behavioral competencies and a strong mix of technical competencies.
- Scalable, cohesive learning solutions that bring teams together around shared frameworks and competencies.

**Suggested Daylight learning pathways:**

- Certified Impact Philanthropy Advisor (IPA) for senior team members or Enterprise IPA for a group experience.
- The Executive IPA program for C-suite decision-makers.
- Introduction to Philanthropic Planning Certificate for associates.
- Certificate subscriptions for the team to access all certificates to build their knowledge.
- Membership in the Impact Advisors Network (IAN) to connect with peers, exchange ideas, and access resources.

**Lee**
**VP of Advisory Practice**
**National Wealth Management Firm**

Lee oversees the firm's advisory practice, including a team of 30 wealth planners. As client demand increases, he is focused on building a scalable philanthropic advisory practice.

*"Philanthropy intersects with many parts of our business. I'm looking for a resource that helps me connect the dots, strengthen our offerings, and ensure our teams are prepared for what's next. Daylight provides a comprehensive set of solutions that enable us to move the entire enterprise forward."*

**Integrators** **Specialists** **Refreshers & Shifters** **Starters** **Enterprise Managers**

## A Connected Learning Ecosystem

Together, these personas represent a spectrum of professionals shaping today's philanthropic landscape. Across experience levels and motivations, advisors consistently seek what Daylight uniquely provides: contemporary, accessible training, a trusted community, research-grounded insights, and pathways to professional excellence.

Whether you're leveling up, starting fresh, specializing, or leading a group or an organization, Daylight equips you with the knowledge, network, and confidence to guide clients through a rapidly changing era of wealth and impact.

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