

Philanthropic Planning with Business Owners

Program Outline (Nov 2025)

More than 99% of U.S. companies are privately owned. Their founders and owners contribute more money and time than non-entrepreneurs. They're more likely to consider themselves philanthropists, to be hands-on in their philanthropy, and to leave legacy gifts. Additionally, approximately 69% of these business owners intend to incorporate charitable giving into their plans for exiting their businesses.

Learning Objectives

By the end of the certificate, you should be able to:

- Understand how philanthropic planning fits into the lifecycle of starting, growing, and exiting different types of business entities.
- Compare opportunities and challenges of charitable planning with several types of business assets.
- Choose potential options for a business to formalize its philanthropy or social impact program.
- Evaluate the potential impact of business ownership transition options on the owner and their philanthropic goals.
- Propose philanthropic planning solutions for a case study of a "millionaire next door" business owner.

Module 1	Fundamentals of Entrepreneurship and Business Ownership
Module 2	Charitable Planning with Business Owners
Module 3	Business Philanthropy and Social Impact Choices
Module 4	Philanthropy as Part of Business Transition & Exit Planning
Module 5	Post-Ownership and Wrap-Up

Module 1. Fundamentals of Entrepreneurship and Business Ownership

1. Introduction to the Course
2. Introduction to Philanthropic Planning with Business Owners
3. Comparing Forms of Business Ownership

4. Sources and Stages of Business Financing

5. Roles of Advisors as Businesses Mature

6. Wrapping Up

Module 2. Charitable Planning with Business Owners

1. Introduction

2. The Opportunity and Considerations for Giving Noncash Assets

3. Key Noncash Giving Questions

4. Closely-Held Stock

5. LLC Interests and Partnerships

6. Restricted Stock

7. Stock Options

8. REITs and Commercial Real Estate

9. Farms and Agricultural Assets

10. How a DAF Might Make This Easier

11. Wrapping Up

Module 3. Business Philanthropy and Social Impact Choices

1. Introduction

2. Aligning with Purpose and Impact

3. Corporate Programs

4. Pillars of Business Philosophy and Strategy

5. Wrapping Up

Module 4. Philanthropy as Part of Business Transition & Exit Planning

- 1. Introduction**
- 2. The Importance of Exit Planning**
- 3. Wrapping Up**

Module 5. Post-Ownership and Wrap-Up

- 1. Introduction**
- 2. Financial Transitions**
- 3. Emotional and Identity Transitions**
- 4. Purpose, Legacy, and Family Philanthropy**
- 5. Your Evolving Roles**
- 6. Hailey Case Study**
- 7. Wrapping Up**
- 8. Certificate Completion - What's Next**

Questions? Email us - learn@daylightadvisors.com