

ENTERPRISE IMPACT PHILANTHROPY ADVISOR GROUP

COMMUNITY FOUNDATIONS

WHAT IS THE ENTERPRISE IPA GROUP?

It's a transformative era for wealth and philanthropy, requiring new competencies and cultural dexterity to thrive. Amidst a historic \$124 trillion intergenerational transfer of wealth, community foundations and advisors have an extraordinary opportunity to grow their business, deepen donor relationships, and expand their impact.

The **Enterprise IPA** offers a cohort-based learning experience. Designed for community foundations, it allows teams of staff, philanthropic partners, and affiliated advisors to go through the program together—building shared language, stronger collaboration, and greater community impact.

Community foundations that invest in the Enterprise IPA group gain:

- Greater alignment around donor engagement and grantmaking strategies.
- Stronger collaboration between staff, fund holders, and advisory partners.
- Increased confidence in navigating complex giving conversations.
- A consistent framework to guide values-based, community-driven philanthropy.

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IPA has assisted me not only with understanding the tools and strategies for charitable giving but also with how to assist clients with their other advisors in developing plans for impact.

- Brian Balduzzi, Esq.,
Tax LL.M., MBA, CFP®,
CEPA®, AEP®, IPA



Philanthropy has evolved. So should your training.

IPA WILL HELP YOU



IPA EXPERIENCE

- Live group discussions facilitated by industry practitioners.
- 20 weeks of learning designed by expert advisors.
- Readings, case studies, video lectures, interactive learners' journal.
- CE available for CFP®, CPWA®, CIMA®, RMA®, CAP®, CSPG^{CM}, CFRE.
- Certified Impact Philanthropy Advisor certification awarded upon completion.

HOW IT WORKS

- Select your cohort: January, April, July, October.
- Two months' advance notice required to launch a group.
- A signed enterprise agreement is required.
- Minimum 10, maximum 15 learners. If fewer than 10 paid registrations, the enterprise is responsible for the cost of the remaining seats.
- One complimentary registration for every three paid.
- Fee per learner:
 - Nonprofit & Independent: \$2,500.
 - For Profit: \$2,850.

WHAT'S INCLUDED

- Dedicated Daylight partnership manager.
- Certified IPA facilitator assigned to your group.
- Custom registration link and group onboarding.
- For Learners:
 - Online community with other IPA learners.
 - Access to Daylight's Collaborative Philanthropy Certificate (\$800 value).
 - Access to the Impact Advisors Network (IAN) after graduation (\$300 value).
 - One year of access to Advisors in Philanthropy (AiP) after graduation (\$350 value).