



Your learning partner for growth and impact.

As philanthropic advising continues to evolve, we're helping advisors build the knowledge, skills, and community needed to serve clients more effectively. This month, we're celebrating learner achievements, sharing new opportunities, and highlighting leaders advancing the field.

CELEBRATING GROWTH

83 advisors became Certified IPAs this spring, bringing our community to more than 400 professionals. Take a look at our growing list; you might [find colleagues, peers, and friends](#).

Our [Introduction to Philanthropic Planning \(IPP\) Certificate](#) has been named a finalist in the Philanthropy category of the [2026 Wealth Management Industry Awards](#). IPP was created to provide a practical on-ramp to modern philanthropic planning for advisors. Within four months of launching, 330 advisors enrolled across 42 U.S. states and 17 countries, demonstrating strong interest in developing the skills needed to support clients' philanthropic goals. Register for the two-module, complimentary program!

RECOGNIZING EXCELLENCE

Nominate a leader for the 2026 DAF Giving Summit Awards. Did you—or someone you know—help catalyze a transformational gift, launch a groundbreaking partnership, develop an innovative advising strategy, or advance philanthropy in a meaningful way over the past year?

If so, we encourage you to submit a nomination to the [2026 DAF Giving Summit Awards](#) and help us celebrate excellence, innovation, and impact across the DAF ecosystem. Previous award recipients include [Jaimi Cortes, IPA](#), whose work exemplifies the creativity and commitment these awards seek to honor.

Leading the way. Across philanthropy, wealth management, journalism, and social impact, Daylight learners are helping shape important conversations and advance the field.

- [George Suttles, IPA](#), joins the Marguerite Casey Foundation as a board member.
- Private client attorneys Brian Balduzzi, IPA, and Lisa Presser published "[Giving Up to Save Down: Income and Estate Tax Efficiencies Through Upstream Estate Planning](#)" in the New Jersey Law Journal.
- Xanthe Scharff's *TIME* article, "[Child Labor is Helping Power the Clean Energy Transition](#)," has been nominated for a National Association of Black Journalists 2026 Salute to Excellence Award.
- Travers Oliver, IPA, was recently featured by [CryptoPhilanthropy](#), sharing insights on digital assets and charitable giving.
- Ada Prince Williams, IPA, led the session, "[Redesigning the Room](#)," at The Perennial Gathering in Japan.
- Kristen Giant, IPA, will deliver the keynote address at the Advisors in Philanthropy Conference and present on "[Using AI and structured interviews to preserve family foundation story and strategy](#)."

ADVANCE YOUR PRACTICE

- Join the [July 9 or August 10 IPA Info Sessions](#) and receive \$250 off registration.
- Registration is now open for the July and October [Certified IPA](#) cohorts. Recent cohorts have sold out, so we encourage early registration.
- 32% of advisors uncover hidden client assets through charitable giving conversations (*The Generosity Effect 2026*, T. Rowe Price). For advisors serving business owners, those conversations can be even more impactful.

With more than 99% of U.S. companies privately owned and nearly 69% of business owners planning to incorporate charitable giving into their exit strategies, philanthropic planning has become an essential advisory skill. Daylight's [Philanthropic Planning with Business Owners Certificate](#) prepares advisors to help clients align business, wealth, purpose, and legacy throughout the business lifecycle.

- Access all Daylight certificate programs for \$1,500, including [Behavioral Philanthropy](#), [Impact Investing](#), and [Philanthropic Planning with Women](#). Complete all six certificates to earn 30.5 CE hours while building a comprehensive philanthropic advising skill set.

WHERE WE'LL BE

- [Purposeful Planning Institute \(PPI\) Rendezvous](#), July 20-23, Boulder, CO. [Certified IPAs](#) Tony Macklin, IPA, and Marguerite Griffin, IPA, along with Daniel Felix, will be presenting on Collaborating Competently Around Client Purpose and Social Impact.
- [Arizona Charitable Gift Planners](#), August 18, Phoenix, AZ. Dien Yuen, IPA, and Megan Bell, IPA, will share the 9 Components of a Modern Philanthropic Plan.
- [DAF Giving Summit](#), September 23-25, Austin, TX. Dien Yuen, IPA, and Tony Macklin, IPA, will lead an interactive lab session.

Thank you for being part of a growing community of advisors shaping the future of philanthropic advising.

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Team Daylight

Daylight

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