CERTIFICATE OFFERINGS

Daylight's certificate programs are built for advisors in wealth management who want to deepen their expertise and confidently address clients' most complex planning challenges. These programs help you stay ahead of industry trends, deliver greater value, and continue growing as a trusted advisor.

Program benefits include:

- **Flexible online learning:** Complete coursework at your own pace, on your own schedule.
- **Targeted and practical content:** Focus on technical topics or specialized market segments that directly support your practice.
- **Continuing education credits:** CE available for CFP®, CPWA®, CIMA®, RMA®, CAP®, CSPG℠, CFRE.
- **Professional recognition:** Earn a certificate that demonstrates your expertise and commitment to excellence—ideal for sharing with clients or adding to your professional profile.
- **Cost effective:** Unlock all certificate programs with one low annual subscription fee.

79%

of investors agree they would be much more loyal to a financial advisor who actively helps them invest in a way that also has positive impact on the world.

Source: Nuveen's Sixth Annual Responsible Investing Survey

OUR CERTIFICATES

Behavioral Philanthropy Certificate
The Behavioral Philanthropy Certificate, created in partnership with ideas42, helps advisors deepen their understanding of how behavioral science and philanthropic advising intersect. The program explores the psychological factors that influence donor behavior, common barriers to giving, decision-making processes, and the role of social and family dynamics in philanthropic outcomes.

Philanthropic Planning with Business Owners Certificate
Approximately 69% of business owners intend to incorporate charitable giving into their plans for exiting their businesses. In this certificate, you'll learn about wealth building through business ownership and the philanthropic planning implications of various business structures and assets. You'll gain insights into frameworks for managing companies' philanthropy and social impact programs. You'll also learn about your role in helping business owners find their purpose and meet philanthropic planning goals before, during, and after exits from their businesses.

Collaborative Philanthropy Certificate (Included with Certified IPA Program)
Donors and foundations increasingly want to work alongside other donors. They want to leverage their peers' knowledge, resources, and lists of effective nonprofits, movements, and impact investments. You'll explore global trends, research, and case studies on collaborative funds, giving and investing circles, women's funds, and similar tools. Developed with Philanthropy Together, this program provides you with actionable strategies to integrate collective and collaborative giving practices into your client offerings.

Gift Planning Certificate (Q1 2026)
The Gift Planning Certificate equips advisors with the knowledge and tools to help clients make meaningful, tax-efficient gifts that reflect their values and create lasting legacies. You'll explore the fundamentals of gift planning, the giving vehicles every advisor should know about, and forward-thinking strategies for donating noncash assets. The curriculum blends technical expertise with cultural and values-driven insights, preparing advisors to navigate complex planning conversations and solutions for clients and organizations.

Impact Investing Certificate
The Impact Investing Certificate equips advisors with fluency in core concepts and key terminology, an understanding of common impact investment vehicles, and the ability to evaluate how impact strategies can complement and extend traditional philanthropy by balancing financial performance with measurable social and environmental outcomes. The curriculum addresses evolving market dynamics, regulatory considerations, and client-appropriate opportunities.

Introduction to Philanthropic Planning Certificate (Complimentary for all Advisors)
The Introduction to Philanthropic Planning Certificate is designed for advisors seeking a foundational baseline or refresh in modern philanthropic advising. The program introduces core vocabulary, frameworks, and tools to help clients articulate purpose, align giving with values, and pursue meaningful social impact. Participants gain a clear understanding of the Philanthropic Advising Competency Model, the nine components of contemporary philanthropic planning, and the evolving social impact toolkit—including donor-advised funds, private foundations, and emerging structures.

Philanthropic Planning with Women Certificate
As women take a more active role in financial decision-making, understanding their goals and investment preferences is a business imperative. As clients, women are more likely to donate to charities, want to involve their families in philanthropy, and invest in social and environmental impact goals. In this certificate, you'll gain insights into the differentiated needs, preferences, and behaviors of women in managing their finances and how those decisions are reflected in their philanthropy and social impact goals.

	Individual Certificate	Annual Certificate Subscription (Access all certificates for 12 months)
Nonprofit & Independent Practitioner	$700	$1,400
For Profit	$800	$1,500

Looking to elevate your team's capabilities? Ask us about our enterprise learning packages.