
Introduction to Philanthropic Planning Certificate

(Feb 2026)

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.

Learning Objectives

By the end of this certificate, you will be able to:

- Explain the knowledge and skills required for effective advising within the Philanthropic Advising Competency Model.
- Describe the nine components of modern philanthropic planning, including representative client deliverables.
- Explain the fundamentals of the modern social impact toolkit, including donor-advised funds, private foundations, and emerging structures and trends.
- Apply conversation prompts to lead discovery discussions that surface client values, purpose, and legacy goals.
- Predict how the advisor's role will evolve as a collaborator with others across the stages of developing and implementing philanthropic plans.

Module 1	Laying the Groundwork
Module 2	Preparing for Meaningful Impact

Module 1. Laying the Groundwork

1. Introduction to the Certificate
2. Philanthropy Today
3. Modern Philanthropic Advising
4. Components of a Philanthropic Plan
5. Supporting Clients' Philanthropic Journeys

-
6. Purpose Clarification
 7. Resource Allocation
 8. Governance Choices
 9. Strategy Definition
 10. Wrapping Up

Modele 2. Preparing for Meaningful Impact

1. Introduction
2. Vehicle Choices
3. Tactical Choices
4. Assessment and Learning Program
5. Operational Choices
6. Legacy and Succession Planning
7. Ethical and Cultural Considerations
8. Considering Your Future Role
9. Wrapping Up
10. Certificate Completion - What's Next

Questions? Email us - learn@daylightadvisors.com