



Revealing a greater impact

October was a milestone for us as we welcomed seventy-two learners into the inaugural [Impact Philanthropy Advisor](#) program. The learners connected in our online platform, and we kicked off the program with an intro into the philanthropic advising landscape. Last week, we explored the social impact landscape and created a social enterprise in our groups (including a fun pitching session!). This week, we dive into the philanthropic journey, what it entails, and how to guide our clients and donors in their exploration. Sign up for the January or April cohorts and join in on the fun, learning, and connecting! The special \$250 off fee will end with the January cohort.

We are hosting a special post-election webinar on November 7th. Crystal Thompkins will present at the Charitable Gift Planners (CGP) Conference in Orlando, and we will also present at the Advisors in Philanthropy (AIP) Conference in San Jose. I have the unique privilege of presenting at Schwab Impact this year! Be sure to say hello if you see us! And don't forget to tune into our podcast, [Illuminate Philanthropy](#), for the continuation of the *Adapting to 8 Trends in Philanthropic Advising* series and special guests sharing timely and relevant advice you can use.

Stay tuned in November for details about the new certificate programs. Please let us know how we can continue to support advisor education for greater impact.

Thank you for your support and partnership.

Dien and Team Daylight
learn@daylightadvisors.com

POST-ELECTION WEBINAR

Daylight

Thursday, November 7, 2024

9am PT/12pm ET

Registration required

learn@daylightadvisors.com

www.daylightadvisors.com

The upcoming election has significant implications for the global landscape. Potential tax and other legislative changes present unique challenges and opportunities for wealth advisors and philanthropic clients.

Join our expert panelists for a **post-election discussion** about the impact to philanthropic planning.

Don't miss this opportunity to gain valuable insights, just in time for end-of-year client conversations.



Dien Yuen
CEO
Daylight



Rick Peck
Consultant, Advisor Practice
Daylight



Sara Barba
Principal
Integer, LLC

Maximum capacity of 50 participants

Register

Daylight Featured in Wealthmanagement.com

WealthManagement.com

Daylight CEO Underscores The Need For Philanthropic Planning Know-How

OCT 11, 2024

Those advisors in the UHNW space without philanthropic planning services and understanding could be "left behind" by 2030, according to Daylight Advisors CEO Dien Yuen.

Daylight's Dien Yuen and Advisory Board member Padric Scott were featured in a recent article in WealthManagement.com, [Daylight CEO Underscores the Need for Philanthropic Planning Know-How](#). The article highlights the importance of advisors connecting the dots between estate, financial, and philanthropic planning.



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LUMINARIES AWARDS 2024

FINALIST

Daylight is pleased to be a finalist in the [ThinkAdvisor](#) Luminaries Awards' Thought Leadership and Education category!

Our research is the world's most comprehensive study of philanthropic advisors. We attempted to better understand who philanthropic advisors are, how they work, and how they are compensated.

[Download the 2024 U.S. Philanthropy Advisor report!](#)

Illuminate Philanthropy Podcast



**Illuminate
Philanthropy**
Powered by Daylight

In this inaugural series of Illuminate Philanthropy, we will explore *Adapting to the 8 Key Trends in Philanthropic Advising*. Each episode will explore a key trend. Tune in as we shine a light on the power of philanthropy and how advisors can drive impactful change.

- [Episode 1: Changing Client Base](#)
- [Episode 2: Evolving Definitions](#)
- [Episode 3: Evolving Vehicles](#)
- [Episode 4: Questioning Norms](#)
- [Episode 5: Growing Mistrust](#)

In the Field: Where to Find Us

OCTOBER

- [Adapting to 8 Trends in Philanthropic Advising in SE Asia](#) Virtual (Oct 29, Singapore)
- [SOCAP](#) in San Francisco (Oct 28 - 29)
- [Charitable Gift Planners Annual Conference](#) in Orlando (Oct 28-29)

NOVEMBER

- [Hawaii Tax Institute](#) in Hawaii (Nov 3 - 7)
- [Post-Election Webinar](#) Virtual (Nov 7)
- [Greater Washington Community Foundation](#) in Washington DC (Nov 13)
- [UHNW Institute](#) in NYC (Nov 13 - 14)
- [AIP Conference](#) in San Jose (Nov 13 - 15)
- [Schwab Impact 2024](#) in San Francisco (Nov 19 - 24)

Daylight Partners



Daylight

[Daylight](#) is a global professional development community for philanthropy and social impact. Together with advisors and families, we support the practices and networks to maximize philanthropy's potential for transforming lives.



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