



Your learning partner for growth and impact.

Dear Friends,

This month, we onboarded 74 learners in our [Certified Impact Philanthropy Advisor](#) program. We're celebrating as it marks the first anniversary of IPA and brings our total registration to 354!

Our IPA groups are led by seasoned practitioners from the field who are also Certified IPAs. We thank our October facilitators, [Beth Harper Briglia](#), [Bleu Blakslee](#), [Kristn Giant](#), [Randi Hogan](#), [Doug Page](#), [Jilla Tombar](#), and [Joy Webb](#), for guiding our group conversations.

DAFopedia

Written *by advisors, for advisors*, [DAFopedia](#) harnesses the collective intelligence of leaders across wealth management and philanthropy to navigate the evolving landscape of donor-advised funds (DAFs) and beyond. We're bringing you fresh content weekly, including how one giver [leverages](#) the use of DAFs and a private foundation, tips for working with [women donors](#), and how to use an [investment policy statement](#) to align your client's values. Contribute an article, share it with your peers, or sponsor the go-to platform for DAF learning!

Gift Planning Certificate

With more than \$105 trillion in assets passing to the next generation and \$18 trillion to charities, now is the time for advisors to deepen their expertise in gift planning to effectively support their clients' philanthropic plans. The [Gift Planning Certificate](#) explores the fundamentals of gift planning, the giving vehicles every advisor should know about, and forward-thinking strategies for donating noncash assets. Created by [Aquanetta Betts](#) and [Crystal Thompkins](#), the curriculum blends technical expertise with cultural and values-driven insights, preparing advisors to navigate complex planning conversations and solutions for clients and the organizations they care about. We'll be launching the Certificate in Q1 2026.

Voice of the Advisors

[Dianne Chipps Bailey](#), a member of Daylight's Advisory Board, and [Tony Macklin](#) will dive into the 2025 Bank of America Study of Philanthropy to offer you insights and opportunities to grow your work with philanthropic clients. [Join us](#) on November 3rd to learn how affluent Americans leverage sustainable investment strategies, assess the impact of their giving, and how the economy and other forces may drive donor behaviors and community impact throughout 2025 and beyond.

Who's Recommending DAFs?

DAFs are now among the most widely used charitable planning tools, but who is recommending DAFs to donors and clients? What are their backgrounds, and where do they work? Extracting data from our 2024 survey of 258 philanthropy advisors, we found that 140 of our respondents (54%) reported having used or recommended DAFs in the prior three years. [Learn more](#) about their backgrounds, who they serve, and what services they provide.

Connect with Us

- Enrollment is now open for the January [Certified Impact Philanthropy Advisor Program](#). Register by January 9, with classes starting the week of January 12.
- Join the [November 12th Info Session](#) to get details on the IPA program and save \$250 on the registration.
- Look for us at the Minnesota Gift Planning Association's [Annual Conference](#), the [Hawaii Tax Institute](#), and the [UHNW Institute Symposium](#).

Team Daylight's been busy creating philanthropic advising curriculum and resources for your professional development needs. Here's a snapshot of what we've accomplished so far. Let us know how we can grow our impact together!



(Click timeline image to enlarge.)

We'll be back next month with more resources, stories, and opportunities to support your advising journey.

Warmly,
Team Daylight

Daylight

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