

Daylight Advisors

Revealing a greater impact.

We launched Daylight Advisors to address the growing demand for advisors who want modern, scalable knowledge and skills to drive sustainable, equitable change.

Like you, these advisors wanted to be a part of a global learning community, to be fluent in philanthropy, and to test out ideas. We support their passion for growth, service, and more significant philanthropic outcomes. The encouragement we received energized us, and we are grateful for the trust our community shared with us.

We started our work by launching the first comprehensive survey on philanthropy advisors. Our data will generate deep conversations and bring advisors together to discuss, share, and understand our work. Collectively, we can strengthen the community of philanthropy advisors, create more visibility, and professionalize our practices.

Soon, you will hear more about our philanthropy certification programs and learning labs. Our research and engagement with families and advisors inform these offerings. We aim to design programs that are accessible and relevant to your work today.

As philanthropy advisor-entrepreneurs, we remain in the field near and far, even as we build Daylight. If you see us at an event, please come up and share what you'd like to learn and how we can grow together!

Please [remember to subscribe](#) for all that is to come, and [follow us on LinkedIn](#).

Sincerely,
Dien and Team Daylight

Welcome Crystal Thompkins, Director of Strategic Impact!

We are thrilled to welcome Crystal as our newest team member. Crystal's more than 25 years of commitment, excellence, and relationships in gift planning, philanthropic advising, and financial services will be invaluable as our community works to reimagine and elevate the field of philanthropic advising.

With more on Crystal's portfolio to come soon, we can say that her leadership will align with this quote from Oprah Winfrey in [her post](#): "The key to realizing a dream is to focus not on success but significance, and then even small steps along your path will take on greater meaning."

"My vision is for all nonprofits, especially those that are BIPOC-led or BIPOC-serving, to have access to gift planning expertise & resources to effectively engage donors for generations to come. In short, gift planning for all. It can be done. We can help do it."

- Crystal Thompkins
(lower right)



Coming in early 2024: the first research report in our series on philanthropic advisors

Philanthropic advisors play a crucial role in helping families and organizations create impact and social change, but very little is known about them. Who are they? How do they learn their trade? Who do they serve? How do they carry out their work? And exactly what impact do they have on the philanthropic sector?

Last fall, as a first step toward mapping our fragmented field, we launched the first survey of its kind to understand the experiences of philanthropic advisors. Respondents represented a variety of roles, including those in private practice, community foundations, other nonprofit organizations, banks, and investment management firms.

We learned that these individuals create real impact! Our respondents each facilitated an average of \$50 million in philanthropic giving last year. DAFs were among the most commonly used charitable tool.

We also learned that the field is becoming more diverse. In fact, over half of respondents who were new to their role as an advisor—defined as having fewer than 10 years of experience—were BIPOC.

Our sincere thanks to all who took the time to complete the survey. Look for the full report to be released in early 2024, along with a series of interactive webinars in which we will discuss implications and recommendations.

Daylight subscribers will be among the first to receive the report and invitations to the webinars. If you have not yet subscribed, [sign up here](#) to be notified of this and future research initiatives.

In the Field: where to find us and our partners



Give2Asia and King Baudouin Foundation webinar

Dien in discussion on "Leveraging Diaspora Communities for Philanthropic Support." *Completed*, and contact us or [G2A](#) for more.



Women of Color in Fundraising and Philanthropy Symposium

Dien to present "A Solid 'Foundation: best practices in grantmaking, DAFs and family philanthropy." *Completed*, [virtual](#), and contact us to learn more.



Purpose Planning Institute Symposium

Breakout session on "Legacy, Culture & Equity," 8:30am Pacific, [February 7, 2024 online](#); part of three hours each day, Feb. 7-9.



SoCalCGP Western Regional Planned Giving Conference

Keynote on "The Spheres of Influence and Impact in Philanthropy," [May 21-23, 2024](#), Costa Mesa, CA.



SOUTHERN CALIFORNIA COUNCIL of Charitable Gift Planners

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SoCalCGP Western Regional Planned Giving Conference

MEET OUR KEYNOTES



Tales From The Crypt – The Weird and Wild
Andrew Fussner, Esq.,
Vice President, Estate Settlement,
American Heart Association



The Spheres of Influence and Impact in Philanthropy
Dien Yuen, JD/LLM, CAP®
CEO, Daylight Advisors



Gone Surfing!
Hitting the waves but keep an eye on your inbox for a gnarly announcement to drop in!

Please [contact us](#) with questions and ideas, and [please subscribe](#) if seeing this via social media, for the latest news and opportunities.



Daylight Advisors

[Daylight Advisors](#) 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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