



Your learning partner for growth and impact.

Dear Friends,

In recent months, advisors have noted a rise in clients interested in philanthropic planning as political shifts and regulatory changes affect community funding. As your learning partner, we're here to equip you with the tools and knowledge to guide these conversations with confidence.

Guiding Clients Through the Philanthropic Learning Curve

Clients often begin with good intentions, but quickly realize that effective philanthropy involves more than generosity—it requires strategy, structure, and self-reflection. The TPI Philanthropic Learning Curve™ is an [accessible and engaging tool](#) that helps clients identify where they are on their philanthropic journey and explore what's possible as they grow. It's a powerful way to open up meaningful conversations and deepen your role as a trusted advisor.

Voice of the Advisor

How do you start the charitable planning conversation with clients? On our [Illuminate Philanthropy](#) podcast, [Brian Balduzzi](#) of Faegre Drinker Biddle & Reath LLP shares how he overcame his hesitation—and why weaving philanthropy into estate planning is paying off.

Philanthropic Planning with Business Owners Certificate

More than 99% of U.S. companies are privately owned, and their founders are among the most active philanthropists—nearly 70% plan to include charitable giving in their exit strategies. This September, we're introducing the [Philanthropic Planning with Business Owners Certificate](#) to help you navigate the implications of different business structures and assets, so you can better support entrepreneurial clients during pivotal moments of transition.

Developing the Philanthropic Advising Sector in Singapore

Singapore's philanthropic advising field is growing, fueled by strong interest from both the wealth management industry and the social impact sector. Daylight is proud to support the Wealth Management Institute's courses, which lead to the Certified Impact Philanthropy Professional (CIPP) program—the first certification of its kind in Asia. In mid-August, we completed the third run of the Advanced course and the sixteenth run of the Foundational course. While many participants pursue the certification for professional growth, we're seeing more join out of personal interest - a sign of a broader evolution in the region's philanthropic landscape. That's why we're developing the *Philanthropic Planning with Asian Families Certificate*, designed to strengthen your global practice.

What's Next

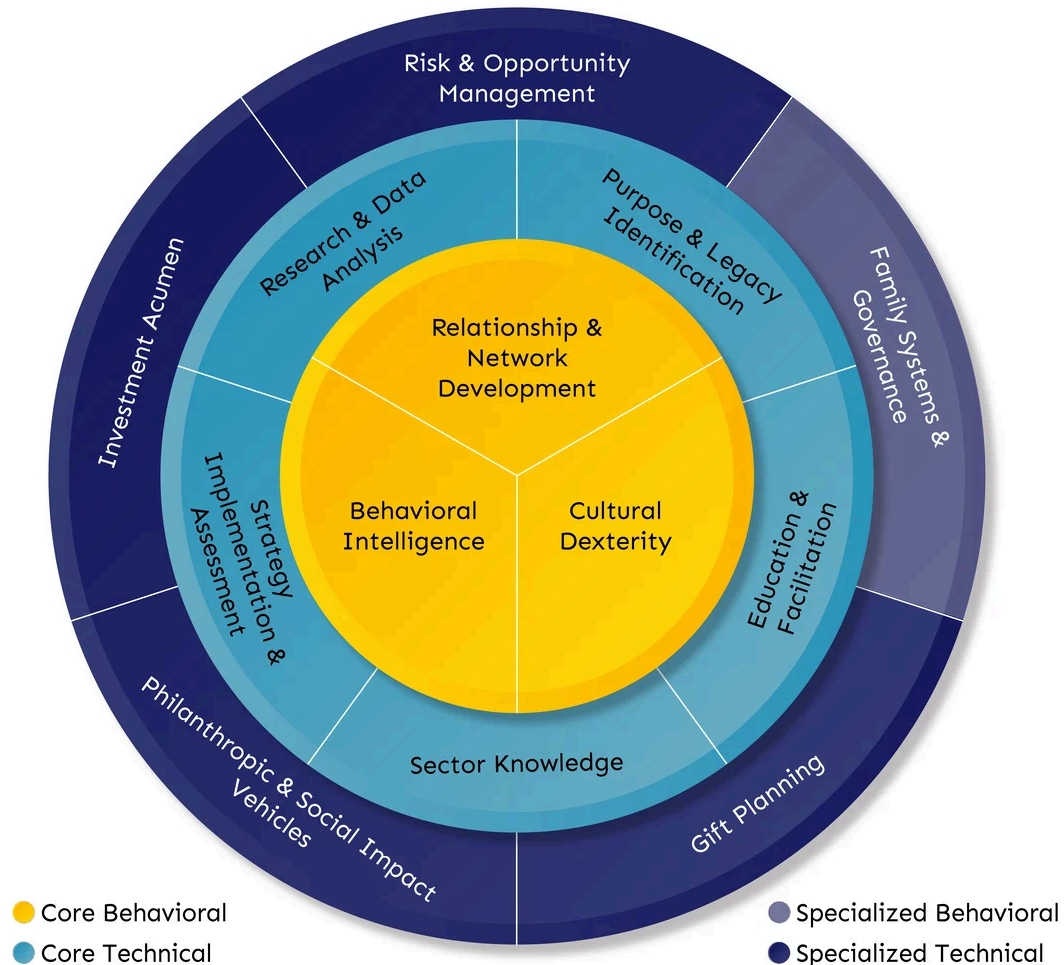
- Enrollment is now open for the [October Certified Impact Philanthropy Advisor Program](#). Register by October 10, with classes starting the week of October 14. Don't miss the [September 9 Info Session](#), where you'll get details and save \$250 off the registration.
- Curious where you stand? Explore the [Philanthropic Advising Competency Model](#) to assess the skills you and your team need to strengthen your advising practice.

- Attending the [DAF Giving Summit](#) in September? We'll be there too, sharing the launch of *DAFopedia*—a collective resource from advisors and philanthropic experts to guide you through the changing world of DAFs.

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

Warmly,
Team Daylight

Philanthropic Advisor Competency Model



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In the Field: Where to Find Us

SEPTEMBER

- [Future Proof Festival](#) in Huntington Beach (September 7-10)
- [IPA Info Session](#) Virtual (September 9)
- [DAF Giving Summit](#) in Washington DC (September 17-19)
- [IDPC Meeting](#) in Grand Rapids (September 24-26)

OCTOBER

- [WMI Singapore CIPP Program](#) in Singapore (October 6-10)
- [IPA Info Session](#) Virtual (October 9)
- [CGP Conference 2025](#) in Indianapolis (October 15-17)
- [MN Gift Planning Association Annual Conference](#) in Minneapolis (October 28-29)

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