



Your learning partner for growth and impact.

Dear Friends,

As your learning partner for growth and impact, our work includes building a visible, connected, and trusted profession. Yet, the field of philanthropic advising is evolving and lacks a clear, shared framework for competencies available to other professions such as financial planning, accounting, family therapy, and professional coaching. The lack of a shared competency model makes it difficult for clients to understand and compare philanthropic advisors' skills and experiences, or for wealth planners and other advisors to make qualified referrals confidently. We're releasing a draft philanthropic competency model this summer to shed... well...daylight on this. The model will describe attitudes, knowledge, and skills essential for succeeding in philanthropic advising roles. It should clarify recruitment, hiring, performance measurement, and professional development plans for employers, staff, and practitioners. We will host in-person events and a webinar for your input, so check back on dates and locations!

On May 28th, we're hosting a [webinar](#) to demystify philanthropic advising business models. The webinar features John Unterreiner, Financial Advisor and Director of Philanthropic Planning from Socium Advisors, learnings from our Prismatic Accelerator program, and research on what successful firms are doing well.

Our April IPA program launched with 64 learners! The July and October IPA registrations are open. Be sure to join the [May 13th info session](#) or [May 28th webinar](#) to receive \$250 off your registration!

Team Daylight is working hard to support your philanthropic planning professional development needs. Help us by sharing our work with your friends and colleagues. Together, we can reach our goal of training 10,000 advisors in Daylight's philanthropic programs!

With appreciation,

Team Daylight
learn@daylightadvisors.com

Interested in IPA? Join our May Info Session

Tony Macklin and Meg Lemieux Bell will share details about the Certified Impact Philanthropy Advisor program and how it supports your growth and impact! Attend and save \$250 on the July or October IPA registration fee—your new fee will be \$2,250 for nonprofits and independent practitioners and \$2,600 for for-profits. Join us and bring a friend! Register [here](#).

CERTIFIED IPA INFO SESSIONS

Daylight

Next session: May 13, 2025

30 minute session

Registration required

learn@daylightadvisors.com

www.daylightadvisors.com

Join an upcoming live Impact Philanthropy Advisor (IPA) information session and learn how IPA can take your philanthropic planning expertise to the next level!

We will provide additional details about IPA, the learner experience, and how it can help accelerate your technical, relational, and practical skills to support philanthropic clients and grow your practice.

Whether you're a client-facing advisor, development professional, or seasoned practitioner, you'll learn what sets IPA apart from other professional development programs in philanthropic planning.



Megan Bell
Director,
Engagement



Tony Macklin
Director,
Advisor Practice

Tuesday, 5/13
9 am PT/12 pm ET

Register

Upcoming sessions:
June 12, 1 pm PT/4 pm ET
July 8, 9 am PT/12 pm ET

Impact Investing Certificate - Open for Registration

79% of investors agree they would be much more loyal to a financial advisor who actively helps them invest in ways that also have a positive impact on the world.

Source: Nuveen's 2021 Sixth Annual Responsible Investing Survey.

The Impact Investing Certificate equips professional advisors with a practical understanding of impact investing. Designed for financial advisors, attorneys, CPAs, and philanthropic consultants who are new to this field or want to update their knowledge, the curriculum moves from core concepts through real-world implementation. [Register now.](#)

Webinar: Improving Your Philanthropic Advising Business, May 28

Interested in learning how others build their philanthropic advising business to retain and attract new clients or donors? Join us on Wednesday, May 28th, as we dive into business models and more! Save \$250 on the July or October IPA registration fee by attending the webinar.

[Register here.](#)

IMPROVING YOUR PHILANTHROPIC ADVISING BUSINESS

Daylight

Wednesday, May 28, 2025

10 am PT/ 1 pm ET

Registration required

learn@daylightadvisors.com

www.daylightadvisors.com

You're part of a growing group of professionals offering philanthropic guidance to clients. Whether you're aiming to expand your practice, champion specific causes, or tap into the great wealth transfer, it's worth asking: Is your current business model as effective as it could be? And will it scale in the way you envision?

Join Team Daylight for an engaging session on the challenges advisory practices face—and the steps successful firms take to boost profitability, deepen client relationships, and amplify social impact. (We've read the research, so you don't have to do it!) Hear firsthand from certified Impact Philanthropy Advisors as they share insights from the front lines.

This webinar is for wealth planners, gift planners, philanthropic advisors and consultants, estate planners, and more. CE credits available.



Crystal Thompson
Director,
Strategic Impact
Daylight



Tony Macklin
Director,
Advisor Practice
Daylight



John Unterreiner
Financial Advisor and
Dir. Philanthropic Planning
Socium Advisors

Webinar will not be recorded.

Register

Special offer!

All attendees are eligible to receive
\$250 off a July or October IPA
registration.

In the Field: Where to Find Us

MAY

- [Conference on Charitable Giving](#) Virtual (May 13)
- [IPA Info Session](#) Virtual (May 13)
- [Western Regional Planned Giving Group](#) in Kalamazoo (May 13)
- [We Give Summit](#) Virtual (May 13-15)
- [NNCG: Understanding the Role and Impact of DAFs in Philanthropic Planning](#) Virtual (May 21)
- [SoCalCGP Western Regional Planned Giving Conference](#) in Costa Mesa (May 21-23)
- [Improving Your Philanthropic Advising Business](#) Virtual (May 28)

JUNE

- [IPA Info Session](#) Virtual (June 12)

JULY

- [IPA Info Session](#) Virtual (July 8)
- [Purposeful Planning Institute Rendezvous](#) in Westminster (July 28-31)

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Daylight Advisors, 1752 NW Market Street, Suite 900, Seattle, WA

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