

Guiding Clients Through the Philanthropic Learning Curve

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2025 Wealth Management.com
Industry Awards
Finalist

As an advisor, you are uniquely positioned to help clients align their financial decisions with their values. Increasingly, these conversations include philanthropy. Yet for many individuals and families, giving isn't as straightforward. Clients often begin with good intentions, but quickly realize that effective philanthropy involves more than generosity—it requires strategy, structure, and self-reflection. The good news is that there are tools to help clients find a thoughtful starting point and avoid feeling overwhelmed.



The Philanthropic Learning Curve

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.

The Curve has six levels:

Becoming a Donor: Your clients are primarily responding to requests from friends and nonprofits and making routine gifts to a congregation or alma mater.

Getting Organized: Your clients want to organize their philanthropy, perhaps through a tool like a donor-advised fund (DAF).

Becoming More Strategic: Your clients believe their giving isn't as satisfying, so they start developing priorities for specific issues, organizations, or places.

Focusing on Issues and Results: Your clients start spending more time learning which organizations and programs make the most difference in their priorities. They begin tracking some measures of success.

Leveraging: Your clients actively collaborate with other donors and advocate for changes in how government agencies or business investments can support their priorities.

Achieving High Impact: They've had years of practice focusing, leveraging, and seeing the cumulative impact of their work. Other donors seek their advice.

Guiding Your Clients

Invite your clients to define their current stage in the journey. Ask them to describe any changes they would like to

make. Then, based on where they want to go, ask yourself what role(s) you might play in supporting their philanthropic work.

Any place is a good place to start. Clients or funds of any means can find meaning and impact at each stage or level if they set realistic expectations for themselves and the organizations they support.

Some areas of their philanthropy and some family members will be at different stages. Complete alignment across the family or areas doesn't have to be a goal.

Achieving their goals or moving along the stages will not be a linear process. Clients shouldn't worry if things happen in fits and starts or if they need to shift gears. A client may revert to previous levels due to changes in their life, interests, or income. They might also quit the journey or revert to the beginning due to circumstances such as a death in the family, changes in family dynamics, starting a new business, or negative experiences with giving.

Not all clients wish to go all the way up the curve. Some clients may not be at a life stage where they have the interest or time to act on their generosity or effectively utilize a philanthropic vehicle.

The *TPI Philanthropic Learning Curve™* helps you ask better questions to provide timely and tailored guidance, builds client confidence, and offers you an opportunity to connect planning tools, resources, and partners.

Clients don't always arrive knowing the kind of giver they want to be. By understanding where they are on the philanthropic curve and walking alongside them, you become a guide to purpose, legacy, and impact—a foundation for a lasting relationship. ■

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