



Revealing a greater impact.

Hello Daylight Friends!

We celebrate our one-year anniversary this month!

Advisors help activate the social impact of families and institutions and there's so much more we can do. So, we set out a year ago to reinvent how philanthropic planning is taught and practiced by advisors. Since then, we:

- Launched the [Impact Philanthropy Advisor](#) certificate program to set a new standard for impact advising. We wanted to build a modern, flexible program able to scale globally and provide advisors with the confidence, competence, and cultural dexterity to better serve clients and givers. Under [Tony Macklin's](#) leadership, we have a contemporary curriculum powered by the latest tech platform, designed for and delivered by industry practitioners. If you haven't signed up yet, be sure to check out the program. We already have four full cohorts! And if you missed our info sessions, you can catch the [replay](#).
- Published a [study](#) to gain a greater understanding of who philanthropic advisors are and how they carry out their work. Who knew that 258 respondents would share that they helped facilitate over \$13 billion in giving over 12 months!
- Received the [WealthBriefing Wealth for Good Award](#) for our Prismatic Accelerator initiative. Led by [Crystal Thompkins](#), we are building a strong pipeline of philanthropy advisors from diverse networks for wealth holders, inheritors, and professionals within the constellation of the wealth advisory sector to call upon.

Our work continues with new programs, continuing education opportunities, and an advisor hub. We need your partnership. Our goal is to engage 10,000 advisors as Daylight Learners in the next three years. Join us, spread the word, and let us know how we might partner to maximize philanthropy's potential for transforming lives!

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

In partnership,

Dien and Team Daylight
learn@daylightadvisors.com

Be an Impact Philanthropy Advisor (IPA)!

Our pilot cohort is sharing their feedback as they review the IPA content to ensure it is accessible, relevant, and valuable for your practice. We are wrapping up the module content and structure review this month.

We're recruiting for our October and January cohorts, so sign up now!



IMPACT PHILANTHROPY
ADVISOR
Powered by Daylight

A NEW STANDARD FOR IMPACT

Beth Harper Briglia, CPA & CAP®
IPA Faculty

"IPA expands the traditional definition of philanthropy beyond what we typically describe as a "contribution" of assets. It includes practical tools that enable advisors to better design and implement a strategy to attain a broader social impact for their clients' comprehensive philanthropic efforts."



Adapting to 8 Trends in Philanthropic Advising

The Daylight Insights Tour is taking us to [Denver \(July 29\)](#), [Aspen \(Aug 2\)](#), [Washington D.C. \(Aug 6\)](#), and NYC (Sept 5), with more dates to come! Join us or let us know if you'd like to co-host a gathering in your city!

The tour is also available on August 20th or August 28th on Zoom. Be sure to [sign up](#) soon as we are expecting to reach capacity.



ADAPTING TO EIGHT TRENDS IN PHILANTHROPIC ADVISING

We're living in an unprecedented period of intergenerational wealth transfer and new wealth creation. The inheritors and wealth creators are more diverse and interested in achieving social impact during their lives. They're ready to use a broader mix of tools and strategies to tackle complex social, economic, political, and environmental issues worldwide.

Are you ready to guide clients and donors through this transformative era for wealth and philanthropy? Join us to learn how to adapt to eight trends in philanthropic advising. The insights are drawn from conversations with hundreds of professionals ranging from wealth advisors to fundraisers, and from family office staff to donor-advised fund leaders.

HOSTED BY



Dien Yuen,
CEO



Tony Macklin,
Director,
Advisor Practice



Crystal Thompkins,
Director,
Strategic Impact

Maximum capacity of 50 participants per webinar

Tuesday, August 20, 2024

9:30am PT/12:30pm ET

[Register](#)

Wednesday, August 28, 2024

12pm PT/3pm ET

[Register](#)

CE credits pending
learn@daylightadvisors.com

Wealth for Good Award

We are excited to receive the WealthBriefing Wealth for Good Award in the Philanthropy Offering or Advice (Americas) category for our Prismatic Accelerator initiative.

We hope this initiative will spark innovation and illuminate hidden talent and assets in philanthropic advising and planning. Stay tuned for plans on what's next as we revisit and upgrade this award-winning initiative!



In the Field: where to find us and our partners

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 and say hello.

- Purposeful Planning Institute Rendezvous in West Minister (July 29-Aug 2)
- Daylight Insights Tour: 8 Trends in Philanthropic Advising in [Denver](#) (July 29)
- Daylight Insights Tour: 8 Trends in Philanthropic Advising in [Aspen](#) (Aug 2)
- Daylight Insights Tour: 8 Trends in Philanthropic Advising in [Washington DC](#) (Aug 6)
- Arabella Advisors: Philanthropic Policy Leaders' Learning Community in Washington DC (Aug 6-7)
- Daylight Insights Tour: 8 Trends in Philanthropic Advising [Virtual](#) (Aug 20)
- South Sound Planned Giving Council Virtual (Aug 21)
- Daylight Insights Tour: 8 Trends in Philanthropic Advising [Virtual](#) (Aug 28)
- Wealthies Award in NYC (Sept 5)
- Daylight Insights Tour: 8 Trends in Philanthropic Advising in NYC (Sept 5)



Daylight 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.



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

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