



Revealing a greater impact.

We've been busy here at Daylight. I have lots of exciting news to share!

Last Fall, 258 friends and colleagues completed our survey on the experiences and needs of philanthropic advisors. The overwhelming response says a lot about the need for data and the deep desire to connect and build a meaningful field. Be sure to download the [report](#).

In February, we celebrated the launch of [Prismatic Accelerator](#), the first accelerator dedicated to increasing multicultural ownership and impact in the philanthropic advising sector with a focus on business growth. Join us in celebrating the success of our inaugural cohort of philanthropy advisors–entrepreneurs!

We welcome two new members to Team Daylight: [Meg Bell](#) and [Rick Peck](#). Meg and Rick are veterans of our industry. They bring unique skills and multidisciplinary backgrounds to our work with wealth advisors, family office practitioners, DAF groups, nonprofit leaders, and philanthropy advisors. If you spot them at an event, say hello and introduce yourself!

Have you ever wondered [where philanthropy advisors come from?](#) During a session at the 2023 DAF Giving Summit, we asked attendees to share their previous three job roles. Forty-two percent came from philanthropy, but the larger percentage listed backgrounds as varied as cowboy, bartender, ecological designer, letter carrier, social worker, and more. Take a look at the data and add to the conversation by [emailing me](#) your last three job roles.

We've been working to build our Impact Philanthropy Advisor (IPA) certificate program to modernize the teaching of philanthropic planning and advising. We've recruited a unique and diverse group of faculty–practitioners to share their knowledge and experience. Stay tuned for updates on the program's launch.

As I said, so much is happening at Daylight! I can't wait to share more in our next newsletter. [Stay connected](#) for all that is to come!

In gratitude,

Dien Yuen, CEO
learn@daylightadvisors.com

New report on philanthropy advisors

Our work as philanthropy advisors is gaining traction among wealth holders, but our field remains a highly fragmented combination of disciplines (e.g., finance, investing, law, family dynamics, fundraising, and nonprofit management). The report, [U.S. Philanthropic Advisors 2024: Professional Development, Practice, and Knowledge Gaps](#), allows us to gain a greater understanding of who philanthropic advisors are and how they carry out their work. We hope the findings will help all those who work within the philanthropic sector to better understand and appreciate our work with clients.



The Prismatic Accelerator has officially launched!



The Prismatic Accelerator is an innovative effort led by [Crystal Thompkins](#) to build the practice of philanthropic advising. The program brings together philanthropic advisor-entrepreneurs with an entrepreneurial vision in a supportive, multi-cultural community that builds on their business acumen to drive growth and sustainability in their practices.

The inaugural cohort of Fellows—[Mark Greer](#), [Tiffany Polite](#), [Denise Sarkor](#), [Jilla Tombar](#), [Lauren Tudor](#), and [Joy Webb](#)—convened in February in Oakland, California, for a kickoff celebration just in time for the Lunar New Year. The two-day event included leadership coaching by Kisha Palmer of The Institute for Inclusive Leadership and business planning fundamentals with Daylight Team members Tony Macklin and Dien Yuen. The discussions were lively, candid, and, at times, deeply personal. The Fellows shared their experiences and practiced skills in a supportive environment guided by principles of showing grace to one another, being comfortable with vulnerability, and celebrating with and for each other.

The kick-off was capped by a great night of fun, fellowship, Korean BBQ, and a commitment to moving forward with shared accountability. The group developed personal goals and created a list of planned “call ins,” meaning they’ll periodically be “called in” with encouragement and support instead of being “called out.”

Over the next several months, Prismatic Fellows will participate in discussions facilitated by sector leaders on topics including business strategy development, marketing and self-promotion, and financial management. The Prismatic Accelerator is a foundational part of the global professional development platform that Daylight is building to innovate the practice of philanthropic advising.

Welcome Meg and Rick!

"As a former wealth advisor, I am concerned about how philanthropy is not often addressed in our work with clients. Each year, half a trillion dollars is donated to U.S. nonprofits, yet the philanthropic conversation is seldom broached within wealth management. My vision is to have CPAs, wealth advisors, trusts and estates attorneys, and family wealth offices have this conversation proactively and with intention at the very start of the client relationship. It would be in the best interest of clients—who generously offer their time, talent, and treasure in numerous ways—while also serving the nonprofit and business communities. No downsides!"

- Rick Peck
(lower right)

"As someone deeply committed to the spirit of generosity and philanthropy, I believe at the heart of philanthropy lies the power of connection. I firmly believe that meaningful connections serve as a catalyst for fostering a culture of generosity and transforming philanthropy into a daily practice."

- Megan Lemieux Bell
(upper right)



In the Field: where to find us and our partners



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

NCFP Community Foundation (April 11)

Community Foundations Topical Call: Playing Multiple Roles as a Philanthropic Advisor with Tony Macklin



Oregon Community Foundation (April 24)

The Spheres of Influence and Impact in Philanthropy with Dien Yuen



36th ACGA Conference in Houston (April 30 - May 1)
Collaborative Discussion: Gift Planning Case Studies with
Crystal Thompkins



Planned Giving Roundtable in Arizona (May 1)
Dien Yuen at 2024 PGRTSA Symposium



Family Wealth Report Awards 2024 in NYC (May 2)
Thought Leadership: Finalist

Daylight

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.



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