



Your learning partner for growth and impact.

Dear Friends,

It's time to celebrate! We're thrilled to have 60 new Certified [Impact Philanthropy Advisors](#) graduate from our January cohort. The new class of Certified IPAs includes philanthropic advisors, wealth advisors, gift planners, and grantmakers from 23 states and 3 countries who have completed the 20-week program and cultivated new relational, technical, and practical philanthropic advising skills. Join us in celebrating our [new graduates](#).

As Certified IPAs, they'll join the growing community of practice for advisors in Daylight's Impact Advisor Network (IAN). The learning journey continues inside IAN with spaces to connect with other Daylight learners and access exclusive webinars, events, and other resources for growth and impact. To learn more about how you can be a part of the Daylight community, join our upcoming [IPA info session](#) on July 8th hosted by Daylight's curriculum developer, Tony Macklin. Attendees receive \$250 off registration for the upcoming July or October IPA cohorts, so register now to secure your seat.

With summer in full swing, it's an excellent time for skill-building and professional development. Learn at your own pace with an annual certificate subscription to access the [Impact Investing](#), [Behavioral Philanthropy](#), and [Collaborative Philanthropy](#) Certificate programs now, with three more certificates coming soon. You can also learn with your colleagues in an enterprise IPA group! Contact us for more details.

Next month we're hosting a webinar to reveal a draft Philanthropic Advising Competency Model, the foundation for building a clear, shared framework in our profession. Follow us on [LinkedIn](#) and visit our [website](#) to get up-to-date Daylight news and information.

With appreciation,

Team Daylight
learn@daylightadvisors.com

Register Now: Competency Model and Behavioral Philanthropy Webinars

Daylight's [Behavioral Philanthropy Certificate](#) helps advisors understand motivations and behaviors for more effective planning and deeper client relationships. [Join us](#) on June 24th for a sneak preview of the certificate program with an interactive webinar featuring the authors from [ideas42](#).

[Register now](#) for the July 17th webinar to be among the first to dive into Daylight's draft Philanthropic Advising Competency Model. We'll shed light on the essential knowledge, skills, and attitudes for successful philanthropic advising.

REVEALING A COMPETENCY MODEL FOR MODERN PHILANTHROPIC ADVISING

Daylight

Thursday, July 17, 2025

10 am PT/ 1 pm ET

Registration required

learn@daylightadvisors.com

www.daylightadvisors.com

The field of philanthropic advising, planning, and consulting is evolving and not a regulated profession in the U.S. It hasn't had a shared framework for the abilities, knowledge, and skills required to successfully tackle changing clients demands and increasingly complex social and environmental challenges.

In this webinar, Daylight and LaCire will reveal our new Philanthropic Advising Competency Model report. Practitioners built the model as a strong draft for other practitioners, employers, and allied professions such as wealth and estate planning and foundation and family office management. Join us to learn about the 13 competencies, their ranges of objectives, how you can use and adapt the draft model, and Daylight's goals for learning with the field to revise the draft.



Dien Yuen
CEO
Daylight



Tony Macklin
Director, Advisor Practice
Daylight



Zach Maynard, PMP
Project Manager
LaCire

Register

Webinar will not be recorded.

Special offer!

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

Daylight on the Curious Conversations podcast

Dien was the featured guest on [Curious Conversations](#), a podcast hosted by Maryann Fernandez, founder of [The Curious Philanthropist](#). Tune in to hear Dien and Maryann discuss the importance of curiosity in advising and how cultural awareness creates planning opportunities for advisors to build trust and guide clients to new ideas about legacy and impact.

New Daylight Partner: National Network of Consultants to Grantmakers

Daylight is proud to partner with the [National Network of Consultants to Grantmakers \(NNCG\)](#) to offer discounted registration for IPA and certificate programs to NNCG members. NNCG is a community of philanthropy consultants committed to building knowledge and skills in the sector. This partnership expands and connects the Daylight and NNCG communities and provides additional professional development, resources, and support to elevate the field.



NATIONAL NETWORK OF
CONSULTANTS TO GRANTMAKERS

In the Field: Where to Find Us

JUNE

- [IPA Info Session](#) Virtual (June 12)
- [Behavioral Philanthropy Certificate Preview](#) Virtual (June 24)
- [WOC Awards](#) in New York City (June 25)

JULY

- [IPA Info Session](#) Virtual (July 8)
- [Competency Mapping Webinar](#) Virtual (July 17)
- [Purposeful Planning Institute Rendezvous](#) in Westminster (July 28-31)

AUGUST

- [Colorado Planned Giving Roundtable](#) in Denver (August 5-6)
- [IPA Info Session](#) Virtual (August 14)
- [WMI Singapore CIPP Program](#) in Singapore (August 16-22)

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