



Adapting to Eight Trends in Philanthropic Advising

Northern California Planned Giving Council
April 22, 2025


OUR WORK

Daylight is a platform where advisors can find the knowledge, ideas, and community to support their passion for growth, service, and philanthropic outcomes.


Our three areas of work help advisors develop their craft, careers, and the field.



AGENDA

- What trends are you observing?
 - Eight trends
 - Your observations on these trends
 - New professional development pathway
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LEARNING OBJECTIVES

- Describe the shifting giving patterns and approaches of wealthy individuals and families
 - Discuss the increasing use and purpose of multiple social impact vehicles
 - Explain the changing definition of philanthropy and social impact
 - Describe how wealthy individuals and families are using technology to organize and give for greater impact
 - Examine the skills and competency needed to serve modern philanthropically-minded clients and donors
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**What trends in philanthropy or gift
planning are
are on your minds?**



1. Changing Client Base

Women

Gen X and younger

Diverse identities

Immigrant entrepreneurs

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Adapting:

Cultural dexterity

Accessible services

2. Evolving Definitions

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Adapting:

Purpose beyond tax deductions

Cross-sector, cross-strategy fluency

3. Evolving Vehicles

Charitable

Private Sector

Public Policy

Peer Based

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Charitable

Private Sector

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Peer Based

Adapting:

Form follows function

New expertise or referral
list

4. Questioning Norms

Past

Power

Privilege

Perpetuity

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Past

Power

Privilege

Perpetuity

Adapting:

Modifying planning assumptions

Involving new voices

Less donor-centric

5. Growing Mistrust

Each other

Nonprofits

Big philanthropy

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Each other

Nonprofits

Big philanthropy

Adapting:

Cultural dexterity

Transparency and ethics

6. Wealth Planning

Fear-based

Outdated proverbs

Preservation-based

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Fear-based

Outdated proverbs

Preservation-based

Adapting: Wealth 3.0

Family & community
flourishing

Strengths- & possibility-
based

Removing either/or

7. AI for Good

Fundraising/donor profile/
operational

Grantmaking
augmentation

Philanthropic funding
areas

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Adapting:

Conversant in AI

Responsible/ethics (TAG)

New policies (talent)

8. Messy Marketplace

Private equity invasion

New innovation (wealth management)

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Private equity invasion

New innovation (wealth management)

Adapting:

Building scalable models

One pocket approach to funding

Centers of influence shifting

SUMMARY

- Changing client base
 - Evolving definitions
 - Evolving vehicles
 - Questioning norms
 - Growing mistrust
 - Wealth planning & Wealth 3.0
 - AI for good
 - Messy marketplace
- 

**Which trend is most relevant as
you grow your work?**

**To which trend will it be hardest
for you and your team to adapt?**



PHILANTHROPY ADVISOR

Powered by Daylight

A NEW STANDARD FOR IMPACT

Built by practitioners for practitioners
at many stages of their careers

IPA EXPERIENCE

- **Cohort** of 12-15 learners
- **12 self-study modules**, each around one hour
- **10 live cohort discussions**, including case studies facilitated by practitioners
- **Learner journal** to apply modules to your clients/donors
- **New peer connections**

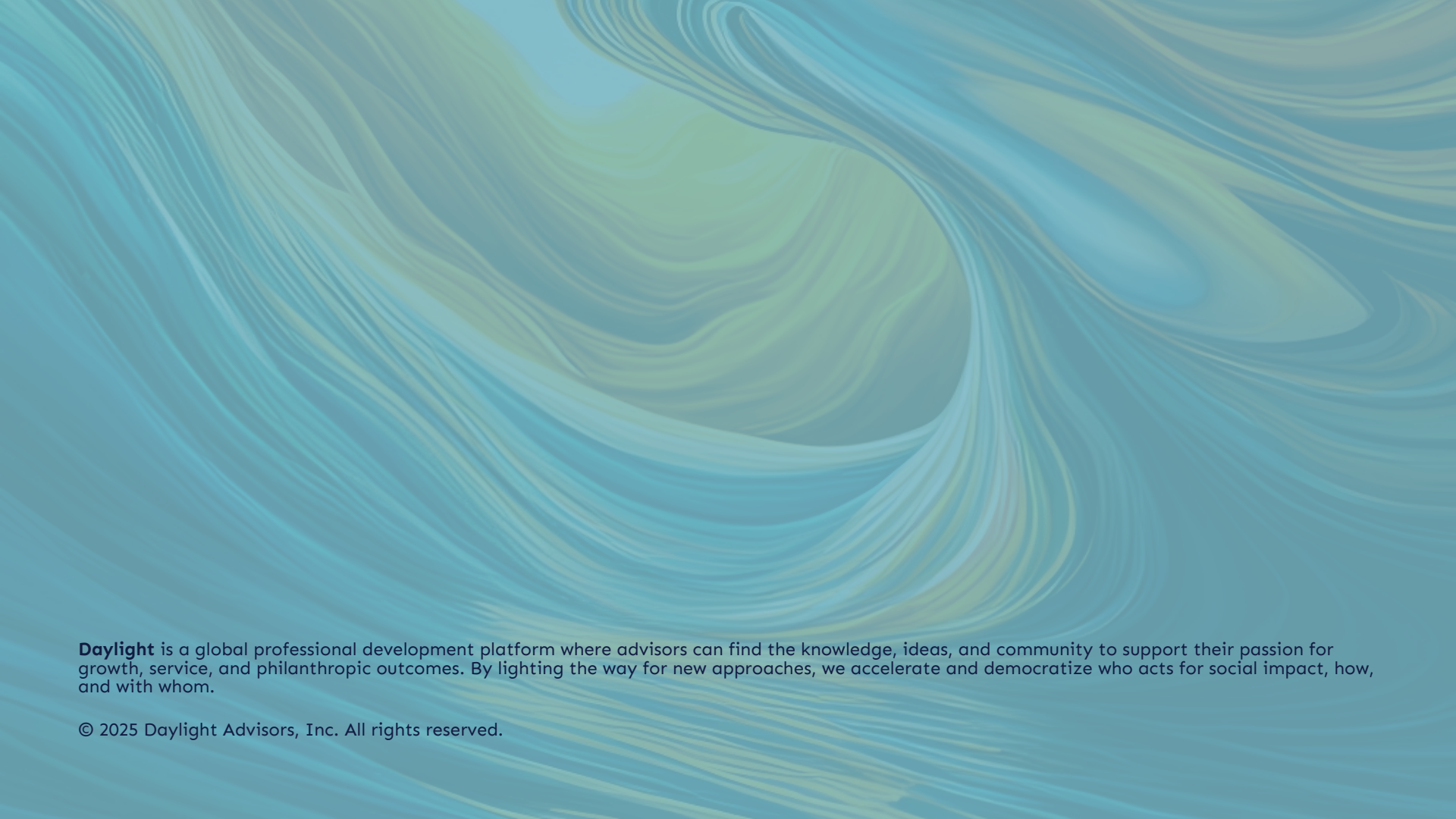




LEARN MORE

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The background of the slide is an abstract, fluid design composed of numerous thin, overlapping lines in various shades of blue and green. These lines flow and swirl together, creating a sense of movement and depth. The colors transition from a light, airy blue to a more vibrant, slightly darker green, and back to a soft blue, giving the overall effect a dynamic and organic feel.

Daylight is a global professional development platform where advisors can find the knowledge, ideas, and community to support their passion for growth, service, and philanthropic outcomes. By lighting the way for new approaches, we accelerate and democratize who acts for social impact, how, and with whom.

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