

# What trends are influencing gift planning?

By Megan Bell and Dien Yuen

At Daylight, we monitor trends in philanthropic advising and listen closely to advisors and gift planners working with clients and donors on the frontlines. One way we do this is by connecting some of the dots we see and asking advisors how it might apply in their day-to-day work and what's on their minds.

In April, we asked attendees at the Northern California Planned Giving Council, "What trends in philanthropy or gift planning are on your minds?"

We received over 60 responses written on notecards. They can be grouped into six general themes: giving styles and trends, gift planning, DAFs, demographics, AI/Tech, and concerns over the current political climate. Below are examples of what the participants shared. Do they resonate with you?

## What trends in philanthropy or gift planning are on your minds?

Giving Styles & Trends	Gift Planning	DAFs	Demographics	AI/Tech	Current Political Climate
<ul style="list-style-type: none"> <li>*Giving that is value based; trust based giving</li> <li>*Younger donors want to see instant impact</li> <li>*Collaborative and collective giving; giving circles</li> <li>*Anonymous giving</li> <li>*One and done gifts ( 5 figures)</li> </ul>	<ul style="list-style-type: none"> <li>*Gifts beyond the simple bequest - life income gifts, real estate, tax advantages</li> <li>* QCDs -- CGA</li> <li>*Not all coming from more traditional 501c3 giving</li> <li>*Opacity- more difficult to connect with donors because of intermediaries</li> </ul>	<ul style="list-style-type: none"> <li>*The rise in giving via DAFs</li> <li>*Donors sitting on DAF funds</li> <li>*The growing popularity and need for philanthropy advisors to know about</li> </ul>	<ul style="list-style-type: none"> <li>*Preferred contact type - hard of hearing, visiting, seeing</li> <li>*Power of marketing in PG - experiences? Is physical mail still relevant?</li> <li>*Generational wealth transfers</li> <li>*Younger, tech-based concentration of wealth</li> </ul>	<ul style="list-style-type: none"> <li>*AI and technology - misinformation, spamming</li> <li>*Presence of tech/AI - tools for research; transparency</li> </ul>	<ul style="list-style-type: none"> <li>*What will donor's response be to current political and economic situation?</li> <li>*How can advisors respond?</li> <li>*Concerns about the stock market influencing decisions</li> <li>*Charitable tax deduction for non-itemizers</li> </ul>

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We've shared our "Adapting to 8 Trends in Philanthropic Advising" presentation to over 600 non-profit and for-profit advisors in many small gatherings. The responses vary based on geography, advisor mix, client or donor sophistication level, etc. One consistent theme is that advisors are looking to broaden their definition of philanthropic planning.

Interested in learning more about "Adapting to 8 Trends in Philanthropic Advising"? Tune in to our podcast, [Illuminate Philanthropy!](#)