Key Study Highlighting How Professional Advisors and Their Clients View Philanthropy Released

The **2026 TPI Study of the Philanthropic Conversation**, conducted by The Philanthropic Initiative (TPI), examines the shifting dynamics, expectations, and practices surrounding charitable giving discussions between financial advisors and high-net-worth (HNW) clients. Co-sponsored by DAFgiving360 and Foundation Source, the national study surveyed 300 professional advisors and 103 HNW individuals possessing $5 million or more in investable assets.

Click here to read the full study: https://tpi.org/resource/2026advisorstudy/

Key Findings & Highlights

- **Elevated Expectations and Initiation:** Discussing philanthropy has officially become a baseline expectation. **90% of advisors** now actively discuss philanthropy with their HNW clients (up from 80% in 2018), and **80% of clients** expect these discussions. Furthermore, 96% of advisors and 80% of clients agree that the advisor should be the one to initiate the topic.

- **Shift from Technical to Personal:** Conversations are shifting away from purely tax-driven strategies. Personal topics—such as values, passions, and legacy goals—are prioritized by **67% of advisors**, compared to just 40% who focus strictly on technical or tax-centric themes.

- **Surge in Structured Giving:** HNW donors are moving away from ad-hoc annual giving toward long-term, multi-year planning. **78% of HNW clients** utilize at least one structured giving vehicle (a massive surge from 43% in 2018).

- **Multigenerational Family Engagement:** Philanthropy has become a primary bridge for family wealth transitions. **95% of advisors** view philanthropy as a critical tool for building relationships with a client's extended family, while 78% of HNW clients express that involving family members in these legacy talks is highly important. [1, 2]

- **Substantial Business Growth Lever:** Advisors who embed philanthropy into their practice see distinct commercial advantages. **90% of advisors** note that philanthropic conversations directly benefit their practice. Specifically, 88% report it deepens existing client relationships, and 92% state it actively helps them capture new clients.

Identified Gaps & Future Priorities

Despite progress, the report highlights a disconnect. Advisors often misread client motivations and lack a granular understanding of nonprofit impact and community issues. Moving forward, advisors are actively planning to sharpen their expertise in **impact investing** (53%), **integrating charitable goals into broader wealth plans** (44%), and gaining deeper familiarity with **nonprofit organizations and community needs** (43%).