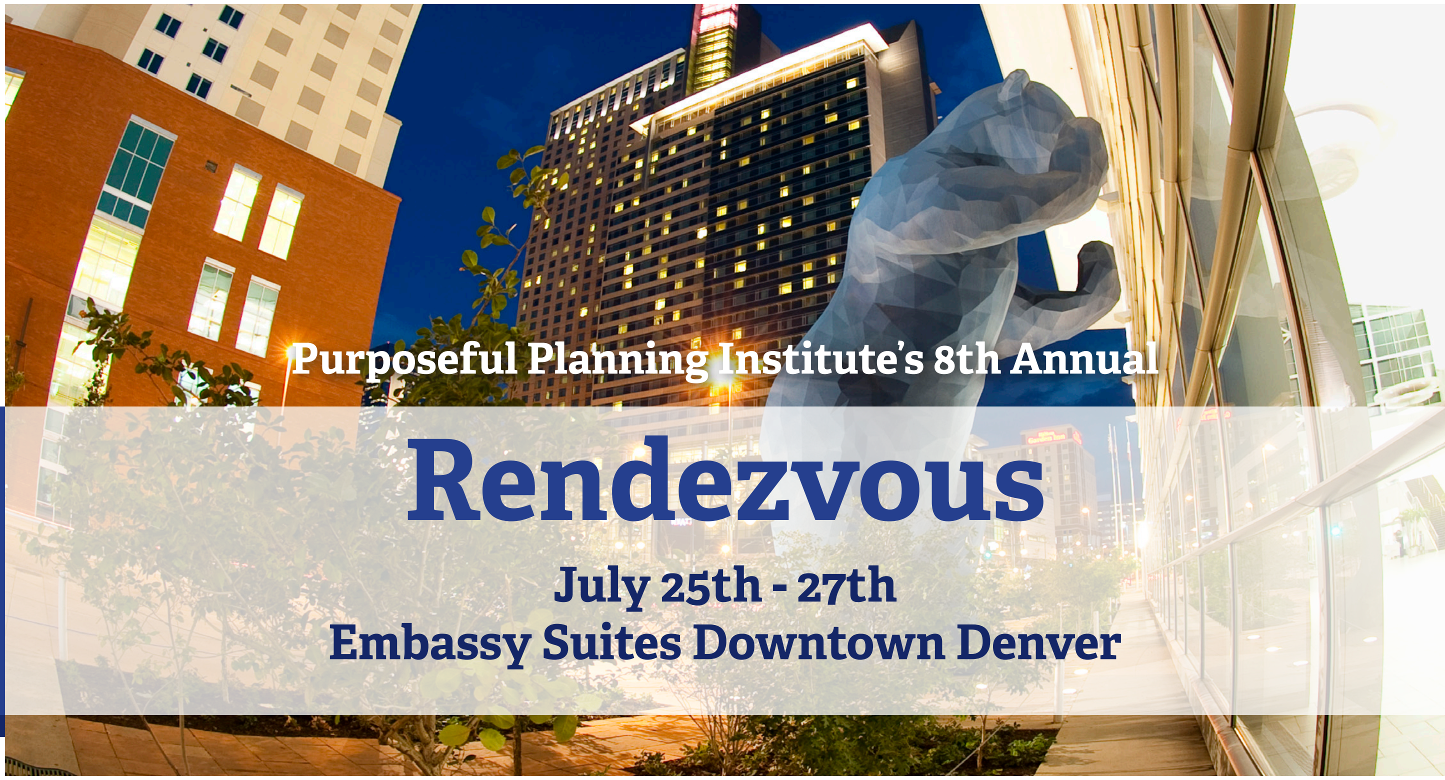

Purposeful Planning Institute's 8th Annual

Rendezvous

July 25th - 27th
Embassy Suites Downtown Denver

Rendezvous is the premier event that brings together professionals representing more than 20 disciplines for collaborative dialogue, keynotes, and breakout sessions centered on family dynamics, governance, collaboration, philanthropy and personal development and growth. Rendezvous provides a home for professionals who are redefining the roles of advisory and consulting services by providing [w]holistic services which address the needs of clients and their families.

- Share your experiences and your best thinking as you participate in interactive learning experiences
- Gain actionable insights from other professionals facing similar complex family planning issues
- Make enduring connections and deepen existing relationships during extended networking breaks
- Build "purposeful" skills that make your client relationships better and professional relationships more satisfying

Don't miss this unique opportunity to participate in inspired learning alongside many of the world's leading thought leaders and innovators!

Presented by the
Purposeful Planning Institute

4600 S. Syracuse, 9th Floor Denver, Colorado 80237 | 303-256-6300 | info@purposefulplanninginstitute.com

PLANNING EXPEDITIONS

The quality of the Rendezvous is a direct reflection of the immense contribution the Expedition members bring and we are incredibly thankful for the dedication and support of our volunteers.

Vision Expedition

Cathy Carroll, *MBA, Founder, Legacy Onward*
Bruce DeBoskey, *JD, Philanthropic Strategist, Keynote Speaker, Author, The DeBoskey Group*
Kristen Heaney, *MSW, BCC, Legacy Consultant, Legacy Capitals, LLC*
John "John A" Warnick, *Esq., Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook*
Matthew Wesley, *JD, MDiv, Director, Center for Family Wealth Dynamics & Governance™ at Merrill Lynch, PPI Dean of Family Culture*

Wisdom Expedition

Debra Beadle, *CAP, Director of Operations, ABS Legacy Partners, LLC*
James Coutre, *Vice President, Insights and Connections at Fidelity Family Office Services*
Nathan Dungan, *Founder and President of Share Save Spend*
Kristen Heaney, *MSW, BCC, Legacy Consultant, Legacy Capitals, LLC*
Marlis Jansen, *Founder, The Money Conversation*
Larry Johnson, *CFRE, Founder, The Eight Principles*
Steve Legler, *MBA, CFA, FEA, Family Legacy Advisor, TSI Heritage*
John "John A" Warnick, *Esq., Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook*
Thomasina Williams, *Principal Consultant, Sankofa Legacy Advisors*

Warmth & Fun Expedition

Cathy Carroll, *MBA, PCC, Founder, Legacy Onward*
Jamie Forbes, *Partner, Forbes Legacy Advisors*
Jeff Savlov, *Founder, Blum & Savlov, LLP – Family Business Consulting*
Michael G. Stuart, *JD, CPA, Founder of The Stuart Legacy Alliance, LLC*
Lewis Weil, *Founder, Money Positive*

Thank You To The 2018 Rendezvous Sponsors!

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THE INTERNATIONAL ASSOCIATION OF ADVISORS IN PHILANTHROPY

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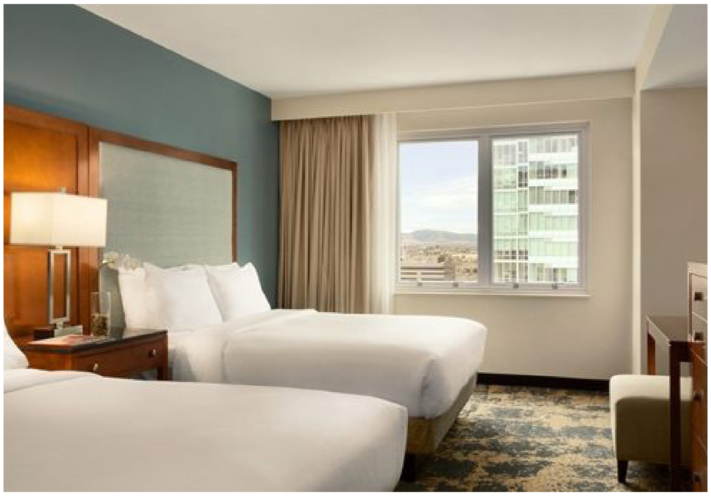
Limited sponsorship opportunities are still available. Please contact us for more information.



REGISTRATION DETAILS

Member Rate: $975

Non-Member Rate: $1,375

Register by March 30th and receive preferred pricing. Check our website for details and current offers. www.purposefulplanninginstitute.com

HOTEL INFORMATION

Embassy Suites Downtown Denver
1420 Stout Street
Denver, CO 80202
1-800-HILTONS
Book Online

Discounted Group Rate: $199

The room rate includes complimentary internet access in your guestroom and a 30% discount on valet parking.

Group Rate Cut-Off Date: July 2, 2018

Reservations made after the cut-off date or after the group room block has been filled (whichever comes first) will be accepted on a space- and rate-availability basis. **Rooms are limited, so please book early.**

The weather in Denver in July should offer temperatures averaging between 61° F and 90° F (low humidity but with the possibility of rain). Guests are advised to bring light jackets or sweaters for often heavily air-conditioned hotel meeting rooms, restaurants and cooler evenings outdoors.

Suggested attire is business casual.

Before your trip to Denver, and while you are here, drinking plenty of water is the number one way to help your body adjust easily to our higher altitude. The low humidity in Colorado keeps the air dry, like the desert, so you need about twice as much water here as you would drink at home.

GROUND TRANSPORTATION

Taxi Service: The cost from DIA is approximately $60 (one-way). Check with your taxicab company of choice for more information on fares and destinations served.

For a list of providers visit https://www.flydenver.com/parking_transit/transit/taxis.

Shuttle: For airport shuttle service from DIA, the hotel recommends Super Shuttle. Reservations for Super Shuttle can be made online or by calling (303) 370-1300. Estimated shuttle fare from Denver International Airport to the hotel is $34 each way. Reservations are required.

Car Rental: Car rental agencies are located on airport property and provide courtesy shuttle service to and from Jeppesen Terminal. Shuttles pick-up and drop-off from Jeppesen Terminal Level 5, Island 4, outside doors 505-513 (east side) and 504-512 (west side).

For a list of providers visit https://www.flydenver.com/parking_transit/car-rentals.

Public Transportation (RTD Airport Train): The A Train runs every 15 minutes from the airport to Union Station (appx 39 minutes and seven stops). From Union Station you can Uber to the Embassy Suites or you can use the Free Mall Shuttle Ride. If you want to use the Free Mall Shuttle Ride it's a two block (about 3 minutes) walk to the Shuttle stop at the 16th Street Mall & Wynkoop St. There are plenty of signs to guide you and it's a safe area. Once you board the Free Mall Ride you'll ride it until you get to the 16th Street Mall & Stout Street stop (the shuttle will take appx 5 minutes, 0.6 miles). Once you get off at Stout Street walk south a little over one block to 1420 Stout Street. The one way ticket for the A Train is $9 and the Uber ride should be less than $6. The Shuttle is free and runs about every two minutes most of the day.

DIRECTIONS

From Denver International Airport – 30 Minutes/26 Miles

From Denver International Airport (DEN): Exit airport by taking Pena Blvd. Follow Pena Blvd and then merge onto I-70 West. I-70 West to I-25 South, Exit 210A Colfax Ave, turn left onto Colfax Avenue. Turn left on Kalamath. Kalamath becomes Stout. Proceed underneath the convention center. Hotel will be on right, just past 14th Street.

SOCIAL ACTIVITIES & EVENTS

Attendees will have the opportunity to participate in one of several organized group activities on Friday, July 27th. We hope your schedule will permit you to participate in one of the group events on Friday afternoon, which will include a hike / nature walk on a nearby trail, a craft beer tour and an art museum tour.

AGENDA

New this year! Attendees are invited to participate in the Collaborative Learning Experience on Wednesday afternoon at NO EXTRA COST! This highly rated program is the capstone of Fusion Collaboration and the bridge to Rendezvous. Plan to come on Wednesday afternoon and participate in this program and to hear a keynote presentation by James E. Hughes, Jr. and Ian McDermott.

Agenda & Breakout Session Schedule

Wednesday, July 25th

1:00 pm	3:15 pm	**Collaborative Learning Experience: Purposeful Lessons from Metallica** Jeff Savlov	Crystal Ballroom
3:15 pm	3:30 pm	**Break**	Crystal Foyer
3:30 pm	5:15 pm	**The Best is Yet to Come** James E. Hughes, Jr., Esq., & Ian McDermott	Crestone Ballroom
6:30 pm	8:00 pm	**Dinner & Opening Activities**	Crystal Ballroom

Thursday, July 26th

6:30 am	8:00 am	**Registration**	3rd Floor Concierge
7:00 am	7:50 am	**Breakfast & Optional Roundtable Discussions**	Atrium
8:05 am	8:30 am	**The New Vocabulary of Family Wealth** John "John A" Warnick, Esq.	Crystal Ballroom
8:30 am	10:15 am	**Your Relationships Through a Developmental Lens: Transforming Conversations with Compassionate Listening** Christine M. Wahl, MA.Ed.	Crystal Ballroom
10:15 am	11:00 am	**Break**	Crystal Foyer
11:00 am	12:15 pm	**Breakout Sessions**	
		Do You Have Broccoli in Your Teeth? We Must Know Ourselves in Order to Lead Ourselves Mark Hartnett, JD, Melissa Mitchell-Blitch, LPC, CPA, Randy Braddock	Crestone Ballroom Salon A
		The Learning Family: A New Paradigm of Sustainable Development Stacy Allred, MST, Valerie Galinskaya, MBA, Phoebe Massey, BA, Matthew Wesley, JD, M.Div.	Crestone Ballroom Salon B
		Women & Impact Investing: Catalysts, Causes & Capital Jennifer Kenning, Ellen Remmer, MBA, Kirby Rosplock, PhD	Aspen Room
		Building the Family Factor in Legacy Families Doug Baumoel, MBA	Cripple Creek Ballroom Salon 1
		Family Secrets: To Share or Not to Share Jamie Yuenger & Joanne Stern, PhD	Cripple Creek Ballroom Salon 2

Agenda & Breakout Session Schedule

Thursday, July 26th Cont.

		How Can the Advisor's Focus on Self, and Not on the Client, Yield Better Decisions for Both of Them and Both of Their Families? Thomas Schur, LMSW, LMFT	Leadville
12:15 pm	1:30 pm	**Lunch**	Atrium
1:30 pm	2:45 pm	**Breakout Sessions**	
		Adult Development: What Are Your Developmental Edges Christine M. Wahl, MA.Ed.	Crestone Ballroom Salon A
		Secrets to Success from the Hundred Year Family Research Project - The Pivotal Relationship Among Stakeholders in Family Enterprises: Elders, Rising Gens and Non-family Advisors Emily Bouchard, James Grubman, Ph.D., Dennis Jaffe, Ph.D.	Crestone Ballroom Salon B
		How Can Advisors Make Family Meetings with Teens and Young Adults More Meaningful and Effective? Nathan Dungan, Kristen Heaney, MSW, BCC	Aspen Room
		Walking in My Shoes - How Might We Empower Our Clients through Their Money Narratives? Emily Rustemeyer, MA & Claudia Sangster, JD	Cripple Creek Ballroom Salon 1
		Purposeful Communication in Philanthropy: Advising Foundations Towards More Openness and Transparency Roger Sheffield & Leslie Pine	Cripple Creek Ballroom Salon 2
		Journey of the Purposeful Planner: What's the Career Path Look Like? Susan Bradley, CFP, CeFT, Bruce DeBoskey, JD, Kristin Keffeler, MSM, Courtney Pullen, MA, Michael Palumbos, ChFC	Leadville
2:45 pm	3:30 pm	**Break**	Crystal Foyer
3:30 pm	5:00 pm	**FRED Talks** (Fresh, Relevant, Educational and Dynamic)	Crystal Ballroom
		Forget Changing Families: A Radical Approach Family Development Matthew Wesley, JD, MDiv	
		How Professional Development Created Client Engagement and Social Good Amanda Weitman	

Agenda & Breakout Session Schedule

Thursday, July 26th Cont.

		Healing a Disconnected World: Restoring Joy, Empathy and Trust in Families Jon Young	
		A Unique Approach to Working with Families Courtney Pullen, MA	
		Less Than a Million Hours Ian McDermott	
6:30 pm	8:00 pm	**Dutch Treat Dinner Groups** (Optional)*	Local Restaurants

Friday, July 27th

7:00 am	8:00 am	**Breakfast & Optional Roundtable Discussions**	Atrium
8:00 am	9:00 am	**Grounding Theory into Practice: How Adult Development Theory Can Shape Your Client Service** Cathy Carroll, MBA, PCC	Crystal Ballroom
9:00 am	9:15 am	**Break**	Crystal Foyer
9:15 am	10:15 am	**Power Sessions - New this year!** Five shorter "power sessions" that are designed to deliver cutting edge research and best practices on highly popular topics.	
		Technology and You: Connected or Fractured? Paul Hokemeyer, Ph.D. & Heather Hayes, M.Ed., LPC, CA	Crestone Ballroom Salon A
		What Impact Do You Want to Make? Scott Winget, Jonathan Firestein, Jamie Wells, JD, LLM	Crestone Ballroom Salon B
		How Do You Have Intentional Conversations About a 100 Year Legacy Plan? Jerry Nuerge, CLU, ChFC, CAP & Alan Pratt, CAP	Aspen Room
		Creating Legacies of Significance Michael Stuart, JD, CPA	Cripple Creek Ballroom Salon 1
		"Holy PP, Batman!!!" – Gratitude and Positivity are Pillars of Purposeful Planning John "John A" Warnick, Esq.	Cripple Creek Ballroom Salon 2
10:15 am	10:45 am	**Break**	Crystal Foyer
10:45 am	12:00 pm	**Breakout Sessions**	

Agenda & Breakout Session Schedule

Friday, July 27th Cont.

		How Does Understanding Relationship Triangles Inform Your Personal and Professional Lives? Steve Legler, MBA, CFA, FEA, Thomasina Williams, Kathy Wiseman, MBA	Crestone Ballroom Salon A
		Wealth Identity: Strategies for Discovering and Deepening the Journey Toward Purpose and Meaning — For You and Your Client Stephen Goldbart, PhD, Joan DiFuria, MFT, Matthew Wesley, JD, MDiv	Crestone Ballroom Salon B
		Can Your Mindset Determine Your Wealth and Wellbeing? Ron Nakamoto, CFP & Erik Gabrielson	Aspen Room
		In a World of Giants: Redefining Rites of Passage Joanne Stern, PhD & Jamie Weiner, PsyD	Cripple Creek Ballroom Salon 1
		What's More Important: Sustaining Wealth or Family Connection? A Tale of Two Families Jamie Forbes, CAP & Tom Rogerson	Cripple Creek Ballroom Salon 2
		It's More Than Money. What's The True Reward of Putting Family First? Sybil Praski & Amy Castoro	Leadville
12:00 pm	1:00 pm	**Lunch**	Atrium
1:30 pm	4:00 pm	**Open Space / Roundtable Discussions** (Optional)	Crystal Ballroom
1:30 pm	4:00 pm	**Optional Group Activities**	Meet in Lobby

***Optional Dutch Treat Dinner Groups**

We will organize small (usually 4 to 5 people) groups for those who would like go to a nearby restaurant for a dutch treat dinner on Thursday, July 26th. This is a great way to meet other like-hearted, like-minded professionals, as well as a wonderful way to enhance your learning and collaborative experience at the Rendezvous.

COLLABORATIVE LEARNING EXPERIENCE

PPI member Jeff Savlov will facilitate this highly interactive and creative workshop alternating short clips from the documentary "Some Kind of Monster" with small table discussions. Chock full of great examples of challenges professionals face (or are blind to) when working with family clients who are some combination of powerful, wealthy and famous, this film chronicles the heavy-metal rock band Metallica when they hired a consultant during a period of conflict. The band itself, while not blood related, is essentially a family in many ways. The film offers great fodder for discussion about family business dynamics and the challenges and opportunities for professionals – all with an eye toward leveraging the power of interdisciplinary collaboration.

2018 Rendezvous Sessions

Keynotes

The Best is Yet to Come

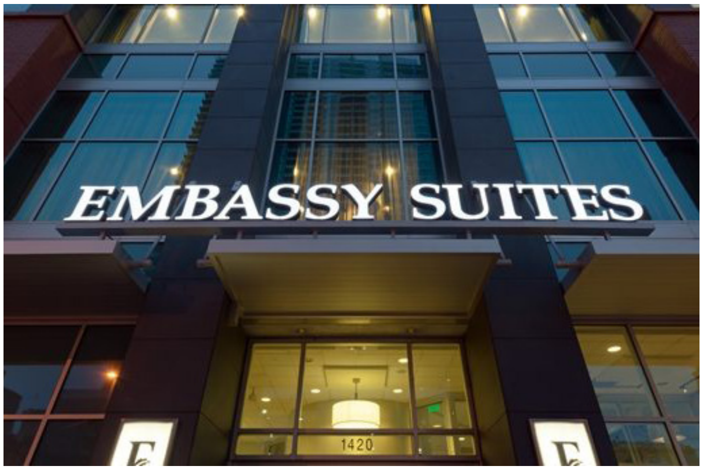
James E. Hughes, Jr., Esq. & Ian McDermott

Ralph Waldo Emerson used to greet friends he had not seen for some while with the question "and what has become clear to you since last we met?" For us things emerge through our collaboration which is why we meet regularly. Now we want to share with you what has become clear to us since last we all met – and explore its implications with you.

We'll focus on three emerging social, economic and cultural trends that promise to profoundly affect our professional futures:

- The re-gendering of the control and ownership of property and wealth throughout the Developed World, Japan and China
- The rise of the Augmented/Fourth economy
- The increasing dominance of Intangible Assets and Qualitative Capital on the balance sheets of not for profit, for profit and family offices.

Potentially a new world is being created and with it the role we will play in it. We believe these changes will be pivotal, the opportunities remarkable – and your professional timing critical. Is a new profession emerging and might you profit from embracing it?



Reshaping Your Relationships Through a Developmental Lens: Transforming Conversations with Compassionate Listening

Christine M. Wahl, MA.Ed

A developmental lens offers us a new way to understand those in our professional and personal lives ~ and ourselves. The well-researched framework of Adult Development speaks to the stages and transitions adults experience as they evolve and develop across their lives. Evolving and developing means expanding one's mindset beyond what we think we know, and helps us handle more complexity. Learning about the stages of adult development helps us meet others where they are, and invites more compassionate listening and engagement with others, and within ourselves. Chris Wahl, MA.Ed, an ICF Master Certified Coach, who founded the Leadership Coaching Program at Georgetown University, has studied adult development for nearly 15 years, and will offer her thoughts on how understanding stages of development contributes to transforming your relationships. Come ready to listen, to feel and think, and to engage in experiences that will open new possibilities for being in relationship.

Grounding Theory into Practice: How Adult Development Theory Can Shape Your Client Service

Cathy Carroll, MBA, PCC

With Chris Wahl's Thursday introduction to adult development theory and our exploration of its application to our individual growth journeys, we now explore its application to our work in service to legacy families. We will examine how stages of development might impact how we and our clients engage with conflict, complexity and collaboration, as well as love and power which sit at the core of our clients' experiences. Last, we will apply this theory to actual client experiences to discover new possibilities for client interaction. Come with curiosity and leave with new insights into yourself and your clients.

FRED Talks

Less Than a Million Hours™

Ian McDermott

That's you and me: we each have less then a million hours so let's get real. We know that the more we develop ourselves the better we can serve families. We also know that the busier we - or they - are the less time we have to step back, take stock, think strategically and attend to what matters most to us.

To that end I want to share with you a way of doing this which I first used with myself and have since used with many of my clients. I think you will find its simplicity and practicality immediately applicable.

Forget Changing Families: A Radical Approach Family Development

Matthew Wesley, JD, MDiv

This FRED talk will present a fundamentally different way of looking at change in families. It will suggest that advisory models requiring families to change are fundamentally broken and don't work in the real world. It will posit that families inherently have the wisdom to adapt and grow through the stages of development necessary for them to meet the challenges of tomorrow. It will show how these capacities are unleashed through oblique, non-linear, systemic strategies rather than direct and linear ones. These oblique approaches actually alter perceptions, slow reactive change, foster environments of innovation and curate productive experimentation. The resulting solution sets are better adapted to the kinds of complex problems families in transition face. By the end of this short journey, advisors will have gained new insight and three key tools to bring to back to their practices.

How Professional Development created Client Engagement and Social Good

Amanda Weitman, MBA

The automation and commoditization of the wealth industry triggered a desire to figure out what in our industry would still require a personal touch. The journey to answer this question resulted in multi-year advisor led book clubs first focusing on how to prepare the next generation to receive wealth well and then to philanthropy. We knew this was a good idea but what actually happened went well beyond our expectations.

Healing a Disconnected World: Restoring Joy, Empathy and Trust in Families

Jon Young

Happiness, vitality, deep listening, empathy, helpfulness, gratitude, forgiveness, and inner peace. We strive to experience these qualities in our own lives, and we want them for the people we love. We all have moments when others help us embody these characteristics and we help others do the same. This longing points to our connective potential, often lying dormant and waiting to be activated, given the right conditions and environment. In this talk, Jon relates from firsthand experience how the neurobiology of our human ancestry and deep nature connection can inform and heal our culture and families.

A Unique Approach to Working with Families

Courtney Pullen, MA

Many of the families we serve have complex needs; as varied and complicated as there are families. Traditionally we gravitate to the following formula; identify the problem, analyze the cause, and recommend a solution. One of the limitations of this approach is it can leave a family feeling like "they" are a problem to be solved. Therefore, I would like to introduce a model grounded in the theory of Appreciative Inquiry where the focus of our attention for change is recognizing the strengths of the family and creating more of those strengths in order to guide them forward.

Please join me for a personal and professional journey into this new realm of possibility.

Power Sessions

Technology and You: Connected or Fractured?

Paul Hokemeyer, Ph.D. & Heather Hayes, M.Ed., LPC, CAI

While the technological advances of the last few decades have altered our personal and professional landscapes, we're just beginning to understand their emotional and relational impacts. In this interactive presentation, Dr. Paul Hokemeyer, one of world's leading relationship and addictions therapists and Heather Hayes, M.Ed. LPC, a world renowned behavioral health interventionist, will lead the participants though the current research and provide exercises to get enable them to obtain clarity around their personal use. Participants will leave the workshop with an understanding of both empirical and personal data as well as a concrete plan of action to optimize technology in their lives.

What Impact Do You Want to Make?

Scott Winget, Jonathan Firestein, Jamie Wells, JD, LLM

Impact is doing good for people, communities and the earth.

* targeted actions --> meaningful change = measurable results

What Impact do you want to make? This will be an interactive workshop focusing on some of the different ways that humans can make an Impact. Sometimes this is accomplished with charitable giving, other times through impact investing and many times a combination of both of these. We'll work through some of the ways Impact can strengthen family relationships and leave lasting impacts on communities at the same time. This exercise will also help advisors lead 'Impact' conversations with their clients.

How Do You Have Intentional Conversations About a 100 Year Legacy Plan?

Jerry Nuerge, CLU, ChFC, CAP & Alan Pratt, CAP

Most traditional estate plans lead a family into the 90/10% Rule: 90% of family wealth and financial wealth are depleted by the end of the 3rd generation. That's not an attractive track to run on. Most families don't know they are running toward it. Learn what happens to family dynamics when they have the intentional conversations necessary to prepare Gen2 to accept the baton from Gen1 with passion and purpose! How does the advisor start these conversations without jeopardizing their relationship with the client? Case examples will show the results. Jerry will play the role of a "resource person" who knows about the tools available through the Center for Family Conversations (a Non-Profit Org), while Alan shares, as an Advisor/Coach how cases are implemented using the tools with a family. The cases will show how much closer family members are about the new legacy they envisioned and put into place!

Creating Legacies of Significance

Michael Stuart, JD, CPA

Update your definitions of 'estate planning' and 'legacy' with this unique and innovative method of combining disciplines and focusing on service using a mindful and purposeful approach. By helping clients capture their values and goals, it provides a unique way to address the issues of the family so that transition is something to be cherished and celebrated. In this session, attendees will learn this new and unique approach through a series of interactive group exercises and table discussions. By establishing new ways of preserving family legacy, future generations can better understand their history through stories, intentions and shared experiences.

2018 Rendezvous Sessions

"Holy PP, Batman!!!" – Gratitude and Positivity are Pillars of Purposeful Planning

John "John A" Warnick, Esq.

Gratitude Works. Positivity Rocks. Positive psychology has demonstrated that gratitude and "learned optimism" are catalysts in the formula for well-being and happiness. Robin would warn us that most people are transferring money and assets and overlooking the opportunity to bequeath a legacy of gratitude and positivity. This power session will not only reveal the science behind gratitude and positive attitude but will illustrate how we can assist our clients create meaningful and sustainable gifts, legacies and transitions. Get started on your path to mastering two of Purposeful Planning's most important pillars, Gratitude and Positivity.

Breakout Sessions

Adult Development: What Are Your Developmental Edges

Christine M. Wahl, MA.Ed, *ICF Master Certified Coach*

The experience of evolving through the stages of adult development can be mighty – every time we transition from one stage to the next, we are taken to our edges. Sometimes the invitation into the next stage is a whisper, and sometimes it's more urgent. In this breakout workshop, Chris Wahl will expand from her keynote to talk about developmental transitions and invite you to experience the edges you may be ready to navigate. In every next stage, your relationship with yourself and the world shifts, and requires you to have faith in what you may not yet see. We will use poetry, conversation, and small group work to address developmental edges, and begin to identify what is being asked of you in terms of capacity, integrity, and integration of heart and head.

How Can Advisors Make Family Meetings with Teens and Young Adults More Meaningful and Effective?

Nathan Dungan, Kristen Heaney, MSW, BCC

While most advisors believe it is essential to reach rising generations earlier to help them prepare for future family wealth roles, we often struggle to find effective ways to engage younger family members. Imagine how a young person would experience a typical advisor meeting. How can we make these environments more relevant? This session will share a model for successfully including younger family members in meetings, along with specific ideas to build momentum with the broader advisory team. Attendees will work in groups to present unique approaches to preparing and executing an effective multi-generational meeting using a case study provided.

Women & Impact Investing: Catalysts, Causes & Capital

Jennifer Kenning, Ellen Remmer, MBA, Kirby Rosplock, PhD

Women, who are the wealth juggernaut of the future, are overwhelmingly interested in investing with their values but face an aspiration gap between their desires and actions. How can advisors effectively help women realize their goals, and in the process, inspire, educate and empower not only women, but the men and families in their lives, to invest for impact. In this interactive session, TPI, Tamarind Partners and Align Impact will share research and lessons learned from case studies, real-life-anecdotes and a national initiative now underway led by TPI—Women Leading the Way in Impact Investing. Through a panel discussion, attendees will develop a deeper understanding of why women are drawn to values-based investing, identify obstacles to activating this interest, and share effective strategies and resources advisors can use to support female and male clients who want to augment their philanthropy with impact investing.

2018 Rendezvous Sessions

How Does Understanding Relationship Triangles Inform Your Personal and Professional Lives?

Steve Legler, MBA, CFA, FEA, Thomasina Williams, Kathy Wiseman, MBA

Note: This session will be limited to 18 participants.

Under Bowen Family Systems Theory, families are complex emotional systems. We will share our varied experiences using BFST to work with clients and increase our own self-awareness.

Using our own family diagrams (a.k.a. genograms), we will illustrate how these simple tools help identify triangles, a key BFST concept.

Participants will draw the genograms of their family and a client family, and learn:

- The value of triangles in understanding a family's emotional system
- How to draw family diagrams and recognize the triangles
- The importance of understanding one's own family emotional system in order to help clients with theirs

Journey of the Purposeful Planner: What's the Career Path Look Like?

Susan Bradley, CFP, CeFT, Bruce DeBoskey, JD, Kristin Keffeler, MSM, Courtney Pullen, MA, Michael Palumbos, ChFC

This panel discussion will help those that have decided to become Purposeful Planners, or those on the journey, get ideas from others who have successfully done it and learn what they can expect along the way. Questions we'll be answering include:

- What was it like when you made the leap to start your Purposeful career?
- Did you have deliverables or tools that you used when you started?
- What did you charge your first clients?
- What did you do for them?
- What were some of the defining moments in your career?
- What were some of the biggest mistakes you made?
- Who were some of your mentors and what did you learn from them?

As your career progressed, what did you charge for your services and what did you do for the families you served?

And more! Our belief is that it's a life-long learning process for everyone who commits to the journey to become a Purposeful Planner and that hearing from Industry Innovators and Thought Leaders will help others as they take their first steps towards beginning their Journey - or as they continue on their journey to mastery. We hope this session gives you hope and inspiration.

The Learning Family: A New Paradigm of Sustainable Development

Stacy Allred, MST, Valerie Galinskaya, MBA, Phoebe Massey, BA, Matthew Wesley, JD, M.Div,

In this participatory workshop, we will examine how successful families move beyond merely preparing the rising gen to becoming learning families. We will start by collectively defining the key characteristics of the learning family. We will then identify the core practices that allow families to embrace learning across generations -- as a means to both effectively adapt as a family and foster the development of individual family members. Through insights and interactive discussion, participants will 1) gain a clearer understanding of how to help families move from models of "success" based on achievement to ones based on learning, 2) have a clearer idea of how to assess some of the key obstacles to change, and 3) how to better identify the strategies empower families to overcome these challenges.

2018 Rendezvous Sessions

Walking in My Shoes - How Might We Empower Our Clients through Their Money Narratives?

Emily Rustemeyer, MA & Claudia Sangster, JD

Consciously or subconsciously, we are all shaped by "money narratives"that drive everything from our decision to buy that morning latte to the nuts and bolts of financial and estate planning. But even as advisors and coaches, how often do we consider the impact of these narratives on our clients' behaviors and emotions? And how do we dig deep with our clients when even talking about our own money narratives makes us squirm? Join us for a brave discussion about money identity, and explore new strategies for helping your clients discover their motivations, values, and confidence in their own narratives.

Family Secrets: To Share or Not to Share

Jamie Yuenger & Joanne Stern, PhD

Keeping family secrets can be toxic—and sharing them can bring understanding and healing throughout generations. But where is the balance between developing transparency and protecting private lives? Does confidentiality build trust or break it? And what is our role as trusted advisors in helping families find courage, wisdom and discernment in choosing whether or not to share their secrets? In this highly interactive session, Jamie Yuenger and Joanne Stern will give real-life examples of secrets in families and the consequences of exposing them—or not. Together we will explore the context, purpose and risk/benefit of sharing family secrets effectively.

In a World of Giants: Redefining Rites of Passage

Joanne Stern, PhD & Jamie Weiner, PsyD

Emerging adults, raised in the shadow of giants, struggle to actualize their own vision of mastery—their identity. The challenge for young people is to develop confidence, demonstrate value to their families, and establish themselves as successful. Historically, cultures utilized "rites of passage" as a potent way for offspring to demonstrate their prowess. In this interactive workshop, Drs. Jamie Weiner and Joanne Stern explore new and more relevant "rites of passage" and the role of advisors in creating a space for the rising generation to emerge and keep their own course while establishing a mature, respectful connection with their elders.

Do You Have Broccoli In Your Teeth? We Must Know Ourselves In Order To Lead Ourselves

Mark Hartnett, JD, Melissa Mitchell-Blitch, LPC, CPA, Randy Braddock

Everyone has a Voice, but not every Voice is easily heard, understood, and appreciated. The 5 Voices is an easy-to-understand, sticky framework to help family advisers better understand their own unique wiring and what it is like to be on the other side of them. 5 Voices will also equip advisers to understand their natural strengths, triggers, ineffective tendencies when those triggers are tapped, and how they can work together to help enhance communication and joint decision making – through a process in which each Voice is heard.

Please check our website for updates and additional information.
www.purposefulplanninginstitute.com

Save the Date for 2019 Fusion Collaboration & Rendezvous:
July 22nd – 27th
Embassy Suites Downtown Denver

Wealth Identity: Strategies For Discovering and Deepening the Journey Toward Purpose and Meaning—For You and For Your Client

Stephen Goldbart, PhD, Joan DiFuria, MFT, Matthew Wesley, JD, MDiv

We have learned that the impact of wealth, whether inherited or earned, has a profound impact on personal identity, self-esteem, and life direction. In the last 2 decades we and our colleagues have developed theories to describe the developmental issues and the steps toward a coherent and meaningful wealth identity.

In this workshop we will outline some of the key dynamics and pathways toward wealth identity, with an emphasis on the ways in which individuals can craft—and live--their own unique sense of purpose and meaning.

We will describe strategies we have developed to help clients discover the processes that enable--or get in the way of-- finding purpose and meaning, being in the flow of joy, connection, and deep awareness.

We will share client stories, describe specific strategies for working with clients, and engage participants in exercises to increase their awareness and understanding of their own capacities and barriers to living their optimal life plan.

Building the Family Factor in Legacy Families

Doug Baumoel, MBA

The Family Factor is a central component of the Deconstructing Conflict framework developed by Doug Baumoel and Blair Trippe. It is the answer to the question "Is the family bond strong enough to leverage compromise, forgiveness and commitment to change". This conversation will present the idea that families of wealth typically have structural obstacles to developing a strong family factor which pre-disposes them to an inability to difficulty in managing conflict. We will explore the implications of the Family Factor in managing conflict, and discuss ideas for overcoming those obstacles in order to build strong Family Factors families of wealth.

What's More Important: Sustaining Wealth or Family Connection? A Tale of Two Families

Jamie Forbes, CAP & Tom Rogerson

What are some of the key behaviors, actions and practices that provide the connective tissue for families, and how can families sustain that over time? Using personal stories from presenters, we'll explore these themes and discuss real examples from these two families. Some intentions failed while other actions succeeded. Participants are encouraged to share their own experiences and observations, helping distill best practices and identify pitfalls.

Whether you advise families or are involved in planning your family's sustainability, this interactive discussion will make you think and provide ideas you can implement.

How Can the Advisor's Focus on Self, and Not on the Client, Yield Better Decisions for Both of Them and Both of Their Families?

Thomas Schur, LMSW, LMFT

The day-to-day work with clients can be a primary mode of self-development for the advisor. This can then result in their clients making better decisions, while the advisor gains more personal maturity that impacts relationships outside of work. In Bowen theory, differentiation of self refers to being able to make thoughtful and effective decisions as one navigates the forces of the systems one is part of. The challenge is to stay grounded in self, which requires controlling the tendency to focus on the other.

This method of self-focus vs other-focus will be demonstrated in an experiential exercise.

2018 Rendezvous Sessions

Can Your Mindset Determine Your Wealth and Wellbeing?

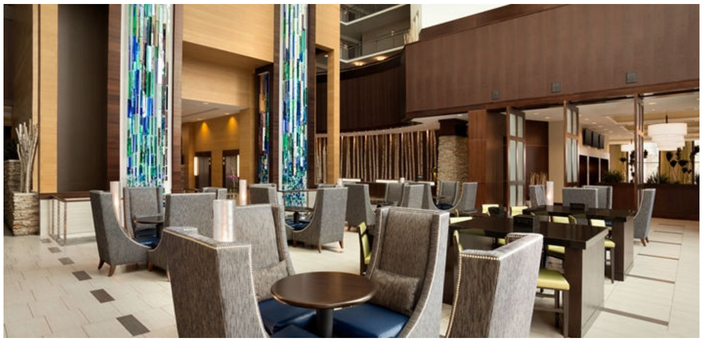
Ron Nakamoto, CFP & Erik Gabrielson

Experience how mindset can help redefine wealth to create greater opportunity and clarity to design a life well lived. We will introduce tools and experiences to help transcend your definition of Wealth Assets beyond material assets and guide a process to help you gain more clarity on what is important to you and why. By introducing experiential learning you will become more aware of the power of how your mindset and filter impact the actions you take. You will leave with more clarity and with actions you can take towards creating what is most important to you.

It's More Than Money. What's The True Reward of Putting Family First?

Sybil Praski & Amy Castoro

This highly interactive/experiential workshop makes the case for how trusted advisors build deeper relationships, access the next generation and ensure families unity during wealth transition. Advisors learn about the impact of wealth and wealth transfer on their best client families, engage with peers regarding best practices for engaging the whole family, and create a tailored action plan. Advisors discover increased satisfaction—beyond asset growth and retention—that comes from helping the inheriting generation become productive contributors to family unity and well-being. Attendees are given questions to discuss in small groups to reinforce key concepts and adapt to their own clientele.



Purposeful Communication in Philanthropy: Advising Foundations Towards More Openness and Transparency

Roger Sheffield & Leslie Pine

There is a growing movement for funders to be more open and transparent about their giving and decision-making. While some families prefer to fund anonymously, others are increasingly developing relationships with grantees and sharing the nuance behind their decision-making. What does honest, open communication look like among funders, advisors, grantees, and the broader community? Using three mini case studies, this session will explore practices and approaches that can foster greater trust and transparency – and ultimately lead to greater impact.

Secrets to Success from the Hundred Year Family Research Project - The Pivotal Relationship Among Stakeholders in Family Enterprises: Elders, Rising Gens and Non-family Advisors

Emily Bouchard, James Grubman, Ph.D., Dennis Jaffe, Ph.D.

Now in its 5th year, the groundbreaking Hundred Year Families Research Project continues to highlight decisive factors helping families succeed across multiple generations. The project has interviewed nearly 100 large global families with significant shared assets who have moved into their 3rd generation and beyond.

In this exclusive Rendezvous update, Dennis, Emily, and Jim will review the latest findings and discuss the vital interrelationships among the Elder Generations, the Rising Gens and the family's long-term advisors and executives. We will explore various dimensions of the intergenerational culture of resilience and excellence that emerges in successful families. Session participants will hear about and exchange recommendations for fostering this "generative alliance" within the families they work with.