



Purposeful Planning Institutes 4th Annual  
**FUSION COLLABORATION**

**July 24 – 25, 2018**  
Embassy Suites Downtown Denver

**Technical Delivered Better; Connections Made Stronger**

Fusion Collaboration is for professional advisors and consultants who want to maintain a leading edge in technical topics and gain awareness of best practices for individual and family flourishing. Attendees will learn how to integrate legacy, relational, and philanthropic best practices into technical planning and get highly practical doses of the best CLE/CPE programming with nationally renowned faculty and innovators.

Presented by the  
**Purposeful Planning Institute**

4600 S. Syracuse, 9th Floor Denver, Colorado 80237 | 303-256-6300 | [info@purposefulplanninginstitute.com](mailto:info@purposefulplanninginstitute.com)

## Registration Details

**Member Rate:** \$950

**Non-Member Rate:** \$1,350

*\*Register by May 30th and receive preferred pricing. Check our website for details and current offers.*

## 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:** June 6, 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.

## Other Notes

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.

## Social Activities & Events

Attendees staying through the week 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.

Please check our website for updates and additional information.

[www.purposefulplanninginstitute.com](http://www.purposefulplanninginstitute.com)





## 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](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](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.

# Planning Expedition

The quality of Fusion Collaboration 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.

**Timothy J. Belber, JD, AEP, Founder & Principal of The Alchemia Group LLC and PPI Dean of Fusion**

**Randy Fox, Co-Founder, Chief Content Officer at EzCharitable, LLC and Editor in Chief at Planned Giving Design Center, LLC**

**Liza Hanks, JD, GCA Law Partners**

**Richard Harris, CLU, AEP, TEP, Richard L. Harris LLC**

**Mark C. Hartnett, JD, Managing Director, Argent Family Wealth Services**

**L. Paul Hood, Jr., Director of Planned Giving, The University of Toledo Foundation, PPI Dean of the Cutting Edge**

**Steve Martin, CFP, RLP, MBA, President, Purposeful Financial Planning**

**Steve Meyers, PhD, Founder, Personalized Philanthropy**

**Josh Patrick, Founding Principal, Stage 2 Planning Partners, PPI Dean of Sustainable Business Enterprises**

**Israel Sands, JD, LLM, Israel Sands Estate Planning and Probate Law**

**John "John A" Warnick, Esq., Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel, Author of the Purposeful Trust & Gift Handbook**

## Sponsors

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

# Thank You to the 2018 Fusion Collaboration Sponsors!

### Silver Level



\*As of 5/15/18, a total of 17 hours of continuing professional education credits have been granted through the CFP® Board (with an additional 10 under review). This program is pending accreditation through the Colorado Supreme Court Office of Continuing Legal and Judicial Education. Please check with us for updates.

## Save the Date for 2019 Fusion Collaboration & Rendezvous:

July 22nd - 27th, 2019

Embassy Suites Downtown Denver

# Agenda & Breakout Session Schedule

Tuesday, July 24th

6:30 am	8:00 am	<b>Registration</b>	3rd Floor Concierge
7:00 am	7:50 am	<b>Breakfast</b>	Atrium
8:00 am	8:45 am	<b>The Innovative Advisor: Stepping Into the Intersection of Family and Financial Wealth</b> Timothy J. Belber, JD, AEP	Crystal Ballroom
8:45 am	9:00 am	<b>Break</b>	Crystal Foyer
9:00 am	10:30 am	<b>The Most Practical and Powerful Ideas From Heckerling and the New Tax Legislation</b> Martin M. Shenkman, CPA, MBA, PFS, AEP, JD	Crystal Ballroom
10:30 am	10:45 am	<b>Break</b>	Crystal Foyer

## Breakout Sessions

10:45 am	12:00 pm	<b>Designing and Managing the Intentional Life Insurance Portfolio</b> Timothy J. Belber, JD, AEP and Scott Mathewson, CFP®	Crestone Ballroom Salon A
		<b>“Siri, can you prepare a codicil to my will?”</b> David M. Lenz, Esq. and Kyle B. Gee, Esq.	Crestone Ballroom Salon B
		<b>Empowering and Engaging the Reluctant Partner</b> Emily Bouchard, MSSW and Liza Hanks, JD	Aspen Room
		<b>Charitable Planning Opportunities &amp; Strategies That Are “Da Bomb” in the 2018 Environment</b> David K. Cahoone, PA	Cripple Creek Ballroom Salon 1
		<b>Develop a Yearly Marketing Plan for Your Firm in One Hour</b> Mary G. Anderson	Cripple Creek Ballroom Salon 2
12:00 pm	1:00 pm	<b>Lunch</b>	Atrium

## Breakout Sessions

1:00 pm	2:15 pm	<b>Purposeful Exit Planning</b> John Brown, Esq.	Cripple Creek Ballroom Salon 1
		<b>Trust Your Gut to Grow your Business: How Being Yourself Can Give You an Edge</b> Eric Herrera	Cripple Creek Ballroom Salon 2
		<b>Opportunity Recognition: How to See Gifts That No One Else Sees</b> Randy Fox	Aspen Room
		<b>Repeat: Designing and Managing the Intentional Life Insurance Portfolio</b> Timothy J. Belber, JD, AEP and Scott Mathewson, CFP®	Crestone Ballroom Salon A

# Agenda & Breakout Session Schedule

## Tuesday, July 24th Cont.

		<b>Repeat: “Siri, can you prepare a codicil to my will?”</b> David M. Lenz, Esq. and Kyle B. Gee, Esq.	Crestone Ballroom Salon B
2:15 pm	2:30 pm	<b>Break</b>	Crystal Foyer

## Breakout Sessions

2:30 pm	3:45 pm	<b>Repeat: Empowering and Engaging the Reluctant Partner</b> Emily Bouchard, MSSW and Liza Hanks, JD	Aspen Room
		<b>Repeat: Charitable Planning Opportunities &amp; Strategies That Are “Da Bomb” in the 2018 Environment</b> David K. Cahoon, PA	Crestone Ballroom Salon B
		<b>Repeat: Purposeful Exit Planning</b> John Brown, Esq.	Cripple Creek Ballroom Salon 1
		<b>Repeat: Trust Your Gut to Grow your Business: How Being Yourself Can Give You an Edge</b> Eric Herrera	Cripple Creek Ballroom Salon 2
		<b>Protecting Heirs and Assets from Predators, Affluenza and Trust Narcissism - Some Keys to Drafting Positive and Purposeful Trusts</b> Israel Sands, Esq. and John A. Warnick, Esq.	Crestone Ballroom Salon A
3:45 pm	4:00 pm	<b>Break</b>	Crystal Foyer
4:00 pm	5:00 pm	<b>Purposeful Legacies - Tools Advisors and Consultants Can Use to Create More Purposeful Plans, Greater Client Satisfaction and Enduring Legacies</b> John A. Warnick, Esq.	Crystal Ballroom
6:30 pm	8:00 pm	<b>Dutch Treat Dinners (Optional)*</b>	

**\*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 Tuesday, July 24th. 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.

**\*Detailed Breakout Session Schedule** The detailed breakout session schedule will be made available to registered attendees via our mobile event app. A printable version will also be made available to registered attendees in June.

## 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.

# Agenda & Breakout Session Schedule

Wednesday, July 25th

6:30 am	8:00 am	<b>Registration</b>	3rd Floor Concierge
7:00 am	8:00 am	<b>Breakfast</b>	Atrium
8:00 am	9:00 am	<b>Purposed and Prepared</b> David R. York, Esq.	Crystal Ballroom
9:00 am	9:15 am	<b>Break</b>	Crystal Foyer

## Breakout Sessions

9:15 am	10:30 am	<b>How Effective Collaboration Can Help Build Your Practice</b> David W. Holaday, ChFC, CAP	Crestone Ballroom Salon A
		<b>Repeat: Opportunity Recognition: How to See Gifts That No One Else Sees</b> Randy Fox	Crestone Ballroom Salon B
		<b>In the Client's Shoes: From the Client's Perspective, What it Looks and Feels Like to Face a Life Changing Event</b> Susan Bradley, CFP®, CeFT®	Aspen Room
		<b>FamTec: Leverage Technology to Maximize Your Impact</b> Shawn T. Barberis, J.D. and Monroe Diefendorf, CLU, ChFC, CFP, RFC, CIMA	Cripple Creek Ballroom Salon 1
		<b>The Angel Herrera Case Study: Tools for Purposeful Special Needs Planning for the Attorney, CFP, Wealth Manager and Trustee</b> Hal Wright and Jane Larrabee, Esq.	Cripple Creek Ballroom Salon 2
10:30 am	10:45 am	<b>Break</b>	Crystal Foyer
10:45 am	12:00 pm	<b>Repeat: How Effective Collaboration Can Help Build Your Practice</b> David W. Holaday, ChFC, CAP	Crestone Ballroom Salon A
		<b>Harnessing the Transformative Power of Generative Trusts, Trustees and Advisors</b> John Cunningham, MA, MFT, Frank Mullins and John A. Warnick, Esq.	Crestone Ballroom Salon B
		<b>Repeat: In the Client's Shoes: From the Client's Perspective, What it Looks and Feels Like to Face a Life Changing Event</b> Susan Bradley, CFP®, CeFT®	Aspen Room
		<b>Repeat: FamTec: Leverage Technology to Maximize Your Impact</b> Shawn T. Barberis, JD and Monroe Diefendorf, CLU, ChFC, CFP, RFC, CIMA	Cripple Creek Ballroom Salon 1
		<b>Repeat: The Angel Herrera Case Study: Tools for Purposeful Special Needs Planning for the Attorney, CFP, Wealth Manager and Trustee</b> Hal Wright and Jane Larrabee, Esq.	Cripple Creek Ballroom Salon 2

# Agenda & Breakout Session Schedule

## Wednesday, July 25th Cont.

12:00 pm	1:00 pm	<b>Lunch</b>	Cripple Creek Foyer
12:10 pm	12:50 pm	<b>Lunch Keynote: Evolution of the Modern Law Firm</b> L. William Schmidt, Jr., Esq.	Cripple Creek Ballroom Salon 1
12:10 pm	12:50 pm	<b>Lunch Keynote: Thriving in a World of Disruption and Change</b> Lee Brower	Cripple Creek Ballroom Salon 2
1:00 pm	3:15 pm	<b>Collaborative Learning Experience: Purposeful Lessons from Metallica</b> Jeff Savlov	Crystal Ballroom
3:15 pm	3:30 pm	<b>Break</b>	Crystal Foyer
3:30 pm	5:15 pm	<b>The Best is Yet to Come</b> James E. Hughes, Jr., Esq. and Ian McDermott	Crestone Ballroom



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# 2018 Fusion Collaboration Plenary Sessions

## The Innovative Advisor: Stepping Into the Intersection of Family and Financial Wealth

Timothy J. Belber, JD, AEP

Building on his Trusts and Estates article Innovate or Die (coauthored with John A. Warnick and Ian McDermott), Tim will discuss and provide a path for technical advisors to increase their own innovative abilities in their client work. Tim will also highlight how the idea of innovation is the thread for Fusion 2018.

## The Most Practical and Powerful Ideas From Heckerling and the New Tax Legislation

Martin M. Shenkman, CPA, MBA, PFS, AEP, JD

For almost a decade Martin Shenkman has been reporting on the proceedings of the prestigious Heckerling Institute on Estate Planning. His observations on the proceedings are published through the Leimberg Information Services and relied upon by attorneys and other professionals to learn about the most important topics discussed at Heckerling. Marty refers to his commentary as his “Heckerling Nuggets”. During this 90-minute plenary session Martin will present “A Review of Heckerling 2018” and the new tax legislation highlighting the best ideas and hottest topics from both the Heckerling Institute and the new tax legislation.

## Purposeful Legacies - Tools Advisors and Consultants Can Use to Create More Purposeful Plans, Greater Client Satisfaction and Enduring Legacies

John “John A” Warnick, Esq. *Senior Managing Founder of the Purposeful Planning Institute, Fellow of the American College of Trust & Estate Counsel, Author of the Purposeful Trust & Gift Handbook*

What does it take to master the art of creating Purposeful Legacies? The Purposeful Planning Institute provides easy-to-use tools which can have enduring and sustainable positive impact. John A. Warnick will share the three categories of Purposeful Legacies and highlight a number of the tools available to PPI members.

Then he will lead us through an actual application of one of the tools which can be easily integrated into your practice, whatever your profession or discipline.

## Purposed and Prepared

David R. York, Esq.

As we approach the beginnings of the largest financial wealth transfer in the history of the World, the surveys of the affluent are clear: Undirected and unintentioned wealth is about to be transferred to unprepared and uninformed heirs. The question we face as advisors is this: What, if anything, can be done about it? This keynote will outline the five laws that determine success in any endeavor, the four essential pillars for effective holistic wealth transfer, the three obstacles that every family must overcome, and the one thing that every client wants.

## The Best is Yet to Come

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

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:

1. The re-gendering of the control and ownership of property and wealth throughout the Developed World, Japan and China
2. The rise of the Augmented/Fourth economy
3. 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?

# 2018 Fusion Collaboration Breakout Sessions

## Designing and Managing the Intentional Life Insurance Portfolio

Timothy J. Belber, JD, AEP and  
Scott Mathewson, CFP®

Life Insurance has become both complicated and misunderstood and is sometimes sold in ways that can actually harm the client. However, in many instances it is the only financial product that can meet a family's need. Come hear industry veterans Scott Mathewson and Tim Belber talk about how to purposely think about the role (or non-role) of life insurance in a purposeful plan and how to effectively engage in a life insurance conversation. Participants will gain a new perspective on the intentional use of life insurance and leave with new tools to help clients with their life insurance questions. This session will benefit any advisor that is involved in life insurance conversations or that works with clients with life insurance as part of their planning.

## “Siri, can you prepare a codicil to my will?”

David M. Lenz, Esq. and Kyle B. Gee, Esq.

Recently, messages created entirely in electronic format have been admitted to probate as wills in some jurisdictions, while the Revised Uniform Fiduciary Access to Digital Assets Act (“RUFADAA”) has become law in more than 35 states. This interactive presentation will illustrate the challenges and opportunities posed by new technologies to our traditional, paper-based practice.

Digital assets still go unidentified in many estate plans, causing significant potential pitfalls in estate administration. We will guide practitioners through identifying these assets, understanding the new legal framework reconciling fiduciary access with user privacy, and navigating the key decision-points with clients to avoid negative outcomes through proper planning. Electronic signatures are growing increasingly common in variety of contexts in our society but only recently has momentum developed toward putting them on wills and other similar planning documents. Should that be allowed? Through a

series of examples and hypotheticals, we will help participants understand the policy lenses through which electronic wills may be viewed, how electronic signature technology can enhance the perceived responsiveness of their practice, and provide an update on the Uniform Law Commission's electronic wills committee and legislative developments around the country.

## Empowering and Engaging the Reluctant Partner

Emily Bouchard, MSSW and Liza Hanks, JD

Every adviser (legal, financial, or otherwise) who works with families in the wealth-planning/estate-planning context knows that often, there's only one voice in the room. And that means that whatever plan comes out of that engagement won't represent the full truth of that couple's lives--there's a missing voice and that means there's a lot of missing information. Inevitably, what's NOT being discussed is going to surface - either during the planning process, as demonstrated by documents going unsigned or meetings getting cancelled or no-shows for appointments, or, even worse, after there's a death in the family. What's not discussed, frankly, is what ruins your planning process or breaks plans that have been executed, and often ruins family relationships, and negatively impacts the adviser's role with the reluctant partner and the rising generation.

In this breakout session, Liza Hanks, an estate planner, and Emily Bouchard, a family dynamics and money coach, will facilitate an engaging discussion about effective strategies to help get the “Reluctant Partner” to speak up, engage, and commit to the planning process.

# 2018 Fusion Collaboration Breakout Sessions

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## Charitable Planning Opportunities & Strategies That Are “Da Bomb” in the 2018 Environment

David K. Cahoone, PA

A collision of economic, political and major Federal tax law changes has created a number of exciting opportunities for all advisors to engage, or re-engage, their clients in charitable planning. We'll focus on a number of charitable planning strategies well suited to take advantage of the opportunities presented by these recent changes.

Areas of conversation will include: using the elimination of most itemized deductions to focus and increase outright and deferred charitable giving; reducing tax increases for residents whose state and local income taxes and property taxes exceed the new “SALT” limitation threshold; and providing a ray of hope to your clients who have lost their 1031 exchange escape for art and other collectibles held for investment. We'll also discuss charitable planning in a rising interest rate environment and the dawning of the age of the donor advised fund.

## Develop a Yearly Marketing Plan for Your Firm in One Hour

Mary G. Anderson

This workshop will give each practitioner and wealth planning professional an opportunity to step back and take some time to evaluate their daily, weekly, monthly and yearly marketing process. We will look at the systems that fit your current plan and/or style (introvert/extravert) and help you to pinpoint exactly where your operation's marketing effort is working as well as going off the tracks. With some new insights you can easily put together the tools that work for you to either fix your systems or introduce some new ways to reach out and 'touch' your ideal clients. This breakout sessions is a hands-on, interactive experience—the instructor will share templates, checklists and additional materials to create your own unique marketing process to put into use immediately when you get back home.

## Purposeful Exit Planning

John Brown, Esq.

Designing plans to move owners from business ownership into meaningful post-exit lives requires creativity, collaboration and leadership. Creativity because most owners have exit goals other than “maximize sale proceeds.” Collaboration because no one advisor has all the skills necessary to manage the many facets of an exit plan and leadership because one advisor on an owner's team must employ an organized process that keeps everyone involved focused on an owner's goals.

In this session, John Brown, attorney, author and founder of Business Enterprise Institute, will describe the exit planning process that hundreds of advisors have used with thousands of owners to successfully transfer companies to third parties, ESOPs, key management teams or the next generation. Two thirds of the exit plans created by members of Brown's organization transfer ownership to insiders (children and employees) because owners have important goals related to their legacies, communities and employees, in addition to financial security.

This session will benefit participants who are interested in working with other advisors to help their business-owner clients make the most of their lives' work.

## Trust Your Gut to Grow your Business: How Being Yourself Can Give You an Edge

Eric Herrera

“Trust your gut” is the popular advice that the data-driven financial world often ignores. But according to the latest psychology research, your “gut instincts” can actually be the keys to your success – when understood properly. Learn how to use your natural instincts to get things done and increase practice revenue.

Eric Herrera is an expert on using talent assessments to help financial services professionals communicate and collaborate with clients to become the quarterback of their client's trusted advisor network. Eric is a Director at Kolbe Corp, one of the leading

# 2018 Fusion Collaboration Breakout Sessions

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talent assessment companies helping businesses today. The company's flagship assessment, the Kolbe A™ Index, is used by individuals and organizations around the world to understand their natural strengths. It is one of the most powerful assessments of its kind with proven reliability and validity.

As part of our presentation, we will be using live examples of how the Kolbe Index can help you with the work you do with your families, co-workers and other stakeholders in your business. For any participant interested in deepening the value of the session we are offering you the opportunity to take and use your own Kolbe A™ Index for a 25% discount from our normal price of \$49.95. Just use this link to get your discount. [www.kolbe.com/ppi2018a](http://www.kolbe.com/ppi2018a)

## How Effective Collaboration Can Help Build Your Practice

**David W. Holaday, ChFC, CAP**

If you are able to effectively explain the benefits of professional collaboration (Multi-disciplinary teaming) to a client, you will gain the position of a thought leader in the mind of the client. With a new client, this will help you to address the client's natural question, "Why should I hire you?" For an existing client, this will help you reinforce your position as a trusted advisor. Much has been written in recent years about how to collaborate. You don't have to be an expert to start. And, there are different degrees to which you might collaborate depending on your practice, the client's needs and circumstances and the other advisors. In this session we will talk about why, when and how to collaborate especially with your most important clients.

## Opportunity Recognition: How to See Gifts That No One Else Sees

**Randy A. Fox**

There are many times when the best solution for a client's problem can be achieved by making a charitable gift. However, many advisors and clients miss these chances because they don't know where to look, what to look for and how to apply the right gift to solve the issue. This discussion will uncover a new way for an advisor to view their donor/client/prospects challenges with a new set of eyes and a different skill set.

## In the Client's Shoes: From the client's perspective, what it looks and feels like to face a life changing event.

**Susan Bradley, CFP®, CeFT®**

Transitions are not gender issues; they are human events that ripple change throughout the lives of individuals and families. We are trained in the technical elements of change but not so much on the personal side. This session, built around a real-life interactive case, is designed to provide an experience of what it is like to be a client facing major life changes.

The opportunity to role play a client has made a strong, and sometimes profound, impact on professionals in the advice-giving business around the world. With increased empathy for the human experience of the common struggles and challenges that come with life transitions, advisors achieve an expanded view of themselves as their client's go-to professional. Many have adjusted their processes and found positive responses from the clients because of the experience.

The session will include two universally practical and effective client tools for managing the complexities of life transitions for existing and new clients.

# 2018 Fusion Collaboration Breakout Sessions

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## Harnessing the Transformative Power of Generative Trusts, Trustees and Advisors

John Cunningham, MA, MFT, Frank Mullins and John A. Warnick, Esq.

Trusts, Trustees and Advisors can be a positive and transformative influence in the lives of beneficiaries. In this breakout session, John A. Warnick will introduce his concept of the Generative Advisor and Trustee. Frank Mullins and several of his team members will provide a case-study based discussion. You'll learn how you can do what Frank and his collaborative colleagues are doing, profitably and effectively. You'll hear the dramatic story of how lives have been changed and how the advisor/client relationship can be transformed and strengthened beyond your wildest imagination. There is a Better Way to design and administer trusts!!!

## FamTec: Leverage Technology to Maximize Your Impact

Shawn T. Barberis, J.D. and Monroe Diefendorf, CLU, ChFC, CFP®, RFC, CIMA

Time is a precious asset, leverage technology to maximize time-efficiency for you and your clients.

Scalability is critical to your business' growth, leverage technology to increase the number of clients your business can contemporaneously engage.

Learn how to leverage technology to digitize your business, increase fees to clients and provide a central portal for clients to access anytime, anywhere.

In the end, leveraging technology will create a more time-efficient, scalable, profitable business while expanding the value you provide families.

## The Angel Herrera Case Study: Tools for Purposeful Special Needs Planning for the Attorney, CFP®, Wealth Manager and Trustee

Hal Wright and Jane Larrabee, Esq.

Hal Wright has written the book (literally) on financial/life planning and trust funding for special needs family members. Jane Larrabee has pioneered the use of Purposeful Special Needs Trusts. Hal and Jane are collaborating on a session which will illustrate how Purposeful Special Needs Planning integrates life, financial and estate planning to create the best possible future for a person with a disability. How does a family create a life plan? What does it look like? How much will it cost? Is it affordable? How much money is needed to adequately fund a special needs or disability trust?

The legal side of Special Needs Planning is made Purposeful when intellect is informed by a compassionate heart. Join us to learn about tools that bring purposeful planning into the special needs area: the purposeful trust conversation; advocate/trustee written guidance; statements of intent. We will also look at a few common obstacles that come into play with special needs families.

## Protecting Heirs and Assets from Predators, Affluenza and Trust Narcissism - Some Keys to Drafting Positive and Purposeful Trusts

Israel Sands, Esq. and John A. Warnick, Esq.

John A. Warnick has created a Surgeon General's warning around the dangers of long-term trusts. Clients smile at it. But virtually every client we talk to is worried about what the money is going to do to their heirs. There are seven keys to Purposeful Trusts. We will be covering two of those keys in this session. We'll share how these simple but powerful design and drafting techniques change the outcomes. You'll never think about nor talk about trusts the same way after you attend this session. And, your clients will be grateful you did.