Rendezvous is a premier event that offers one-of-a-kind learning and networking opportunities for PPI Members & guests. This event will bring together professionals representing more than 20 disciplines for collaborative dialogue, keynotes, and breakout sessions centered on best practices for legacy families and families in business.

- Share your experiences and your best thinking as you participate in interactive learning experiences.
- Enjoy vibrant conversations over Dutch Treat dinner with 4-6 colleagues
- Make enduring connections and deepen existing relationships during extended breaks
- Learn “purposeful” skills that will enrich client relationships and professional satisfaction

Don’t miss this unique opportunity to participate in open space inspired learning alongside the nation’s leading thought leaders and innovators!
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, Founder, Legacy Onward
Bruce DeBoskey, JD, Philanthropic Strategist, Keynote Speaker, Author, The DeBoskey Group
Dean Fowler, President, Dean Fowler Associates, Inc. and PPI Dean of Interdisciplinary Fluency
Hartley Goldstone, Principal of Trustscape LLC, Research Fellow at Wise Counsel Research Associates, PPI Dean of the Trustscape
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
Stacy Allred, MST, Managing Director of the Center for Family Wealth Dynamics & Governance, Merrill Lynch
Alison Comstock Moss, Chief Strategy Officer, Paul Comstock Partners, PPI Dean of Family Sustainability & Empowerment
James Coutre, Vice President, Insights and Connections at Fidelity Family Office Services
Hartley Goldstone, Principal of Trustscape LLC, Research Fellow at Wise Counsel Research Associates, PPI Dean of the Trustscape
Kristen Heaney, MSW, BCC, Independent Consultant with 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

Warmth & Fun Expedition
Debra Beadle, Director of Operations, ABS Legacy Partners, LLC
Cathy Carroll, Founder, Legacy Onward
Nathan Dungan, Founder and President of Share Save Spend
Scott Hamilton, CEO, InKnowVision
Laura Roser, Founder and CEO, Paragon Road
Michael G. Stuart, JD, CPA, Founder of The Stuart Legacy Alliance, LLC

We are currently accepting applications for 2017 event sponsors. For more information visit http://purposefulplanninginstitute.com/sponsorship/
REGISTRATION DETAILS

Member Rate: $825 ($975 after May 15th)
Non-Member Rate: $1,225 ($1,375 after May 15th)
Register by March 30th and receive special early bird pricing!

HOTEL INFORMATION

Omni Interlocken Resort
500 Interlocken Blvd
Denver (Broomfield), Colorado 80021

Call: 1-800-THE-OMNI

Discounted Group Rate: $162
*Room Rate includes complimentary internet access in your guestroom

Group Rate Cut-Off Date: July 5, 2017
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.

Rendezvous will be held at the Omni Interlocken Hotel and Resort located off Highway 36 between Denver and Boulder. Nestled against the backdrop of the Rocky Mountains, this family friendly resort provides a wealth of activities located right on the premises. Golf enthusiasts will enjoy the 27-hole championship golf course, with its striking scenery and more than 400 feet of elevation changes. The Mokora Spa offers a variety of relaxing and rejuvenating spa services. The Omni Interlocken Hotel and Resort also has two heated outdoor pools.
GROUND TRANSPORTATION

Taxi Service: The cost from DIA is approximately $70 (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 Omni Hotel and Resort recommends Green Ride. Reservations for Green Ride can be made online or by calling (888) 472-6656. 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.

DIRECTIONS

From Denver International Airport – 30 Minutes/28 Miles
Exit the airport via Pena Boulevard. Take Pena Boulevard to Exit #6B to Fort Collins/E-470 Tollway. E-470 eventually becomes the Northwest Parkway. You will travel 32 miles along E-470 Tollway. Northwest Parkway ends and becomes Interlocken Loop, which will cross over US 36. Follow this to the next light and turn left onto Interlocken Boulevard. The hotel is located up the hill on the left-hand side, approximately 2 city blocks.

From the South
Take I-25 North to US 36 West. Exit Interlocken Loop/Storagetek Drive and turn left. Proceed 1 block to Interlocken Boulevard and turn left. The hotel is located up the hill on the left side.

From Boulder
Take US 36 East, exit Interlocken Loop/Storagetek Drive and make a right onto Interlocken Loop/Storagetek Drive, then make a left onto Interlocken Boulevard. The hotel is located up the hill on the left side.

OTHER NOTES

The weather in Denver in July should offer temperatures averaging between 61° F and 90° F (low humidity but with 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.

Please check our website for updates and additional information.
www.purposefulplanninginstitute.com
# Agenda & Breakout Session Schedule

## Wednesday, July 19th

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00 pm</td>
<td>Registration</td>
<td>Lobby</td>
</tr>
<tr>
<td>5:45 pm</td>
<td>Cash Bar</td>
<td>Pavilion</td>
</tr>
<tr>
<td>6:00 pm</td>
<td>Dinner &amp; Opening Activities</td>
<td>Pavilion</td>
</tr>
</tbody>
</table>

## Thursday, July 20th

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 am</td>
<td>Breakfast &amp; Optional Roundtable Discussions</td>
<td>Taproom/Terrace</td>
</tr>
<tr>
<td>8:00 am</td>
<td><em>Opening Meditation</em> Stephanie West Allen, JD, PPI Dean of Neuroscience and Contemplative Practices</td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>8:05 am</td>
<td>Purposeful Planning 3.0 John “John A” Warnick, Esq., Founder of the Purposeful Planning Institute and Fellow of the American College of Trust &amp; Estate Counsel and author of the Purposeful Trust &amp; Gift Handbook</td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>8:30 am</td>
<td>Harmonic Vibrancy – Choosing to Share and Experience Abundance Orland Bishop, Founder and Executive Director of ShadeTree Multicultural Foundation</td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>10:15 am</td>
<td>Break</td>
<td>Interlocken Foyer</td>
</tr>
<tr>
<td>11:00 am</td>
<td>Breakout Sessions</td>
<td>Taproom/Terrace</td>
</tr>
<tr>
<td>12:15 pm</td>
<td>Lunch</td>
<td>Taproom/Terrace</td>
</tr>
<tr>
<td>1:30 pm</td>
<td>Breakout Sessions</td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>2:45 pm</td>
<td>Break</td>
<td>Interlocken Foyer</td>
</tr>
<tr>
<td>3:30 pm</td>
<td><em>Panel: Open Forum</em> with Philanthropists Gray Keller and Robert Costa, Jr.</td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>6:30 pm</td>
<td>Dutch Treat Dinner Groups (Optional)</td>
<td>Local Restaurants</td>
</tr>
</tbody>
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*Optional Dutch Treat Dinner Groups
We will organize small (usually 4 to 5 people) groups for those who would like to go to a nearby restaurant for a dutch treat dinner on Thursday, July 20th. 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. Please indicate upon registration if you would like to be included in a group.*
# Agenda & Breakout Session Schedule

## Friday, July 21st

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 am</td>
<td>Breakfast &amp; Optional Roundtable Discussions</td>
<td>Taproom/Terrace</td>
</tr>
<tr>
<td>8:00 am</td>
<td><strong>Opening Remarks</strong></td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>8:00 am</td>
<td>Orland Bishop, Founder and Executive Director of ShadeTree Multicultural Foundation and Matthew Wesley, JD, MDiv, Director, Center for Family Wealth Dynamics &amp; Governance™ at Merrill Lynch, PPI Dean of Family Culture</td>
<td></td>
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<tr>
<td>8:30 am</td>
<td><strong>F.R.E.D. Talks</strong></td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>10:15 am</td>
<td>Break</td>
<td>Interlocken Foyer</td>
</tr>
<tr>
<td>10:45 am</td>
<td><strong>Breakout Sessions</strong></td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>12:00 pm</td>
<td><strong>Closing Ceremony</strong></td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>12:15 pm</td>
<td>Lunch</td>
<td>Pavilion</td>
</tr>
<tr>
<td>1:30 pm</td>
<td><strong>Open Space / Roundtable Discussions (Optional)</strong></td>
<td>Interlocken AB</td>
</tr>
<tr>
<td>1:30 pm</td>
<td><strong>Hike at Chautauqua Park in Boulder (Optional)</strong></td>
<td>Meet in Lobby</td>
</tr>
<tr>
<td>1:30 pm</td>
<td><strong>Golf Outing</strong> (Optional)</td>
<td>Omni Golf Course</td>
</tr>
</tbody>
</table>

The final agenda and detailed breakout session scheduled will be posted in early June. Please check our website for updates: [www.purposefulplanninginstitute.com/rendezvous2017](http://www.purposefulplanninginstitute.com/rendezvous2017)
Each of us live in streams of life processes that are the source of some deep gratitude and which serve as motives for the decisions we make in daily life. The higher purpose of the individual can be found in these inner impulses of gratitude and the meanings they generate for one’s identity and relationships to life.

The “greater good” lies beyond personal fulfillment and depends on our inner experience as the source of inspiration to serve the whole. This may be referred to as the “collective consciousness of gratitude” and can lead to greater realizations of both personal and collective achievements. The key lies in whether the individual can trust in their capacity to share from this inner source of meaning and motive. In other words, that which is to be shared resides in both relationships and resources – both of which require enormous trust in one’s ability to deepen understanding of the self and the whole.

For example, when we consider the collective or shared motive, we become aware that we need each other’s inner willingness to achieve a greater expression of life. The task we have in contemporary living is to understand the linkage between shared power and creativity (both individual and collective) in the midst of a world oriented heavily toward the material aspects of our existence.

We will explore the questions; what do you need from me to be more yourself? What is the nature of an agreement? What levels of agreements can we hold for other levels of reality to emerge?

We are the individual members of a collective power and we can experience this process at ever deeper levels of personal self-fulfillment and while creating a new shared reality.
FRED Talks Cont.

Creating a “Safe Zone” with Strategic Family Philanthropy

Bruce DeBoskey, JD, Philanthropic Strategist, Keynote Speaker, Author, The DeBoskey Group

Philanthropically committed capital, donated to a family foundation or donor-advised fund, separate from a family’s other wealth and off of the family’s balance sheet, creates a unique opportunity to design different rules of engagement for family members. By setting a new table with different ground rules for multigenerational engagement, families can create a “safe zone” in which bonds can be strengthened, communication can be enhanced and families can accomplish great things for themselves and for the world.

On Purpose, For a Purpose: Break Through Barriers, Learn Fast, Collaborate And Attain What You Want Most

Erik Gabrielson, Partner, Activ8, LLC

Persevering a 25% chance of survival at birth, a boy teaches us the power of clarity, collaboration and commitment.

Explore lessons from my son and the hospital that saved him. They came together to create a highly collaborative team with a shared purpose, working together to explore new territory and achieve a seemingly unattainable outcome. Breaking existing beliefs, they aligned around new protocols that now have one of the best, if not the best results in the world.

Step into discomfort, into the unknown, expose your view, connect, learn and act. One little boy’s story will show us the way.

Bridging Wealth Capitals: Insights From 20 Years of Integrated Health Teams Applied to Family Enterprise

Enette Pauzé, PhD, CEO, Level 8 Leadership Institute

With leadership from the World Health Organization, health system transformation has evolved impacting provider, organization and systems levels, internationally. We lead with person-centred care, engaging families and caregivers as stewards of their wellness journey. We learned how to align professional philosophies, scopes of practice, payment models, and training to support a holistic approach to the continuity of care, through integrated care teams and organizational partnerships. Educational institutions, researchers, policy makers, professional organizations, regulatory bodies and other key stakeholders are working better together towards a common vision. Just like individuals, family enterprises are complex, multidimensional systems. No single advisor can meet the needs of the entire system – and we must continue to learn how to work in a more purposeful, integrated, collaborative manner. In this FRED talk, we’ll explore how learnings from health services can be applied to serving enterprising families, bridging and em-powering all of the wealth capitals.

Four-Dimensional Wealth

David R. York, Esq., CPA, Fellow of the American College of Trust & Estate Counsel and Author of Entrusted

When it comes to wealth transfer, there are four essential types of value that one generation can pass to the next generation. 1. The Value of your Core (who you are and what you believe). 2. The Value of your Story (your narrative wisdom). 3. The Value of your Words (your encouragement and affirmation). 4. The Value of your Possessions (your tangible wealth). When it comes to estate planning, the focus too often tends to only be on the Value of your Possessions. This presentation will help people capture and transfer wealth in all its forms.
2017 Rendezvous Breakout Sessions

Empowering Wealthy Families: Preparing the Rising Generation for Significant Wealth Transitions

Nathan Dungan, Founder and President of Share Save Spend
Kristen Heaney, MSW, BCC, Independent Consultant with Legacy Capitals, LLC
Emily K. Rustemeyer, Wealth Planning Associate, Family Education and Governance, Northern Trust Company
Claudia B. Sangster, Director, Family Education and Governance, Wealth Planning Advisory Services, Northern Trust Company

Many parents and advisors recognize the need to introduce their children and younger clients to the topic of money, but initiating those conversations can be a tricky proposition given the financial complexities that exist in affluent families. This session will explore some of the specific ways families are building a common language and equipping their children for “financial adulthood.” Learn how you can provide practical strategies for developing healthy relationships with money, understanding family wealth responsibilities, and setting appropriate financial boundaries and expectations between generations.

Your Collaborative Journey – Don’t Lose Out!

Ian McDermott, PPI Dean of Innovation & Learning, Founder and Chief Executive of International Teaching Seminars (ITS)

Collaboration over time is challenging – ask any couple! Professional collaboration is equally demanding albeit in different ways. But, as in our personal lives, refusal to engage with the challenge has its own costs. Professionally the less collaboration the greater the risk of isolation, under-stimulation underperformance and, frankly, just losing out.

How individuals and teams can retain their autonomy and yet engage with others to everyone’s mutual advantage is a learnable skill set. Fostering these skills is a journey in itself. I want to share with you how to make this journey.

Governing the Family Enterprise

Dennis Jaffe, PhD, PPI Fellow

This workshop, drawing on learning from a study of 100 year old families, will explore the evolution of governance after the first generation as a family adapts and expands. We will look at what triggers the need for family governance, share tools and explore how they can be used, for developing a family working group, leading in turn to a family council assembly, owners group all tied together with a family operating agreement, a constitution.

How Can the Prenup Conversation Strengthen a Marriage?

Emily Bouchard, Managing Partner, The Wealth Legacy Group
Emily Chase Smith, JD, CEO and Founder of ChaseSmith Press

We all know that the clients we work with need prenups, and we also know that this is one of the most challenging and difficult conversations a couple can have. This breakout will focus on HOW to have the prenup conversation in healthy, relationship-strengthening ways.

This interactive session will use role-playing, case studies, an assessment and more to support advisors in successfully facilitating their clients’ prenuptial dialogues to give them the best chance for a happy marriage.

Interdisciplinary Fluency: The Role of the Personne de Confiance

Dean R. Fowler, PhD, President, Dean Fowler Associates, Inc.

To serve families, and to collaborate successfully, persons need to have “Interdisciplinary Fluency.” They must move beyond being an expert in a specific field to understanding holistic needs of the family rather than the specialized expertise of the advisor. In this session, we will explore both how to develop “Interdisciplinary Fluency” and what “Fluency” entails.
2017 Rendezvous Breakout Sessions

Examining the Sacred Cows of Our Professions

Courtney Pullen, MA, LPC, President, Pullen Consulting Group

The purpose of this workshop is to explore and discuss the basic tenants of our professions. We have accepted many of these tenants as basic truths and they guide us in our decision-making and how we approach the families we serve. In this very interactive workshop we will reexamine some of our sacred cows, how they affect our work, determine how we might think differently and discover if there are new tenets to consider? By design, this workshop will explore what is possible. Get ready to be disrupted and for some creative fun along the way!

Giving More: How can you thoughtfully plan for a significant ramp-up in philanthropic assets and giving?

Katherine Linder, Philanthropic Advisor, The Philanthropic Initiative
Lisa Spalding, Partner, The Philanthropic Initiative

The much-anticipated intergenerational transfer of wealth is underway. New foundations are appearing and others are growing with more zeroes attached to the end than ever before. When equipped with the right questions, advisors can thoughtfully and responsibly help clients ramp up their giving or adjust to a sudden infusion of charitable assets. Through an interactive case study based on original field research, participants will walk away from this session armed with key considerations – in governance, administration, philanthropic goal-setting and strategy, grantmaking, investments, tax and legal – for managing a significant increase in giving.

What Core Capacities Must the Rising Generation Develop to Be Successful?

Stacy Allred, Managing Director, Center for Family Wealth Dynamics & Governance™ at Merrill Lynch
Matthew Wesley, JD, MDiv, Director, Center for Family Wealth Dynamics & Governance™ at Merrill Lynch, PPI Dean of Family Culture

Families navigating transition face massive complexity. A large part of that complexity is “preparing” the rising generation. We will offer a framework for understanding that complexity and provide a model for helping the family move towards becoming a deliberately developmental family. After a few minutes of introduction, the group will co-create a powerful and dynamic approach for addressing one client family’s needs. This will be a multi-modal solution involving visualization, design, games, learning and experimentation. Participants will walk away with a framework to use with client families of various levels of wealth and a template for thinking about how to help entire families prepare for the complexities of transition.

Using Games and Gamification with Your Clients

Amy Zehnder, Strategic Wealth Coach at Ascent Private Capital Management of U.S. Bank
Kristen Armstrong, Managing Director, Family Wealth Dynamics Coach, Ascent Private Capital Management at U.S. Bank

The use of games for educational purposes has been around forever in a variety of contexts, but rarely have play and interactive learning techniques been leveraged to their greatest effect in the wealth management profession. Learn about the latest trends in gamification and how you can create simple to complex learning activities for all age groups that are targeted for your client’s needs. At this session, we will share a variety of games, including how you can use them or replicate them with your clients, along with our lessons learned along the way.
2017 Rendezvous Breakout Sessions

How Not to Get Eaten Alive: A Field Guide to Difficult and Demanding Clients

**Moderator:** Jim Coutre, Vice President, Insights and Connections at Fidelity Family Office Services

**Panelists:** Joan DiFuria, Director and Co-Founder Money, Meaning & Choices Institute, James Grubman, PhD, Family Wealth Consulting, Paul L. Hokemeyer, JD, PhD, Senior Clinical Fellow at Caron Treatment Centers

Some clients are very toxic to their families and to us as consultants. They can be so demanding, demeaning, or dysfunctional that they can make us question our right to call ourselves professionals. This unique panel session will offer guidance from three senior consultants to identify markers of difficult clients and how to respond in a skilled manner. Special attention will be devoted to identifying the narcissistic personality, why it is particularly toxic, and how to shift tactics to either manage the situation or know when to walk away.

How Can We Best Recognize, Cultivate, and Support the Family Champion in Our Client Families?

**Jamie Traeger-Muney, PhD, Founding Principal of Wealth Legacy Group**

**Kristin Keffeler, MSM, Principal, Illumination360, Dean of Family Sustainability & Empowerment**

Join us in a collaborative ‘think tank’ style, facilitated brainstorming session to help you recognize, cultivate, and support the Family Champions in each of your client families.

A Family Champion is the family member who recognizes the need to openly dialogue about family wealth and who is able to drive that process forward while maintaining family relationships. As a trusted advisor, you are in a unique position to be able to identify, cultivate and support this family champion, someone who will take action and motivate the family members to build skills, habits, and rituals that support a healthy dynamic around the family’s wealth.

Empowering Presence: How Do We Shift From Awareness to Change (Back by Popular Demand)

**Orland Bishop, Founder and Executive Director of ShadeTree Multicultural Foundation**

**Joan DiFuria, Director and Co-Founder Money, Meaning & Choices Institute**

**Stephen Goldbart, PhD, Owner, Money, Meaning, & Choices Institute**

**Matthew Wesley, JD, MDiv, Director, Center for Family Wealth Dynamics & Governance™ at Merrill Lynch, PPI Dean of Family Culture**

Presence, at its most basic level, is the capacity to be in the flow of experience simultaneously as experiencer and as a witness. Empowering Presence goes beyond simply “being in the moment” to how we, as facilitators, can cultivate ways to generate, facilitate, and anchor transformative outcomes for self and others – on the razor thin edge of where the now gives birth to future possibilities.

In this year’s workshop, participants will gain deeper understanding of this practice, and its application to their personal and professional life.

- Gain sharper insight into what is causing them to “ride the brakes” in their lives, limiting personal and professional bandwidth.
- Identify and initiate pathways and practices to “take the next steps.”
Extraordinary Conversations: The Power of our Questions

Terri Finney, Co-Founder at Startup Wellbeing
Joshua Nacht, PhD, Consultant, The Family Business Consulting Group, Inc.
Andrew Pitcairn, Family Council Chair, Pitcairn

How do we create extraordinary questions with our clients? In this interactive session, we will explore the power of our questions with clients, and look to ways to improve our practice of asking and listening. We will have three main segments: Why are questions more powerful than telling; How to increase the power of our questions; Going deeper: moving from transaction to transformation in our interactions. Each segment will include a bit of theory, interactive practice, and group dialogue with the goal of group sharing and learning. Join three facilitators with diverse backgrounds to explore the power of our questions.

How is Bias Against the Wealthy Affecting You, Your Clients and Your Ability to Serve Them Well?

Kristen Heaney, MSW, BCC, Independent Consultant with Legacy Capitals, LLC
Jeff Savlov, Founder, Blum & Savlov, LLP

Some people are wealthier than others; the gap between rich and poor is widening. These facts engender powerful reactions in all of us. Bias, even rage, against wealthy people has become acceptable. Even the wealthy, and their advisors, carry damaging wealth stereotypes.

With a focus on better serving our clients, this highly interactive workshop uses creative exercises to identify and process our wealth biases starting with perceptions about our own identities (religion, race, gender) then specifically focuses on polarities related to accumulated wealth. We will explore how to help our clients identify and process these challenging stereotypes. Open-minded participants encouraged to attend.

Personalized Philanthropy®: Crashing the Matrix

Steven Meyers, CEO, Personalized Philanthropy: Advising and Coaching for Non-Profits and Donors

Removing the silo barriers in fund development by creating a donor-driven model for philanthropy. The concepts of “annual giving”, “major giving”, and “planned giving” are merged and reinvented allowing philanthropists greater flexibility while creating synergy for the organizations they support.

In this session, we’ll examine the popular phenomenon of “blended gifts” from a different perspective and highlight the stark contrasts between one-off transactions and a lifetime of transformational gifts. A blended gift begins as contributions from more than one sector of your campaign.

We’ll show you how to implement true donor-focused personalized gift designs – blended gifts so intuitive and transformational, you’ll never go back to conventional gifts. We’ll pay special attention to cases and examples of new gift opportunities created by the permanent charitable rollover that can bring you larger gifts and donor impact sooner.
2017 Rendezvous Breakout Sessions

The Biased Advisor: Unpacking Our Unconscious Drivers

Judi Cunningham, MA, FEA, President, Judi Cunningham Consulting
Wendy Sage-Hayward, Owner, Sage Leadership Development Advisors Inc

Bias exists in everything we do and say and drives the choices we make each day. Unfortunately, the majority of these biases are unconscious and unintentional. As an advisor working with families and their businesses, biases can be detrimental for our clients if unmanaged.

Advisor bias involves imposing pre-existing beliefs onto a situation and disregarding facts in the face of contrary evidence. These biases can affect our perceptions about ourselves, our work, and our clients. During this workshop, we will explore ways of managing bias within our multidisciplinary advisory professions in order to provide the best continuity advice to clients.

Our primary goal is to understand, surface and learn how to counter unconscious bias which we believe is an essential step towards providing best-in-class continuity support to family enterprise clients regardless of discipline.

Aligning the Vectors: When Donors Become Investors

Danita Estrella Watts, Founder, Danita’s Children

Danita Watts founded Danita’s Children eighteen years ago, in a small house and fourteen children in Quanaminthe, Haiti. The organization now serves more than 100 orphans, a school with over 300 and serves more than 16,000 meals each month. Danita will speak about her work, its spiritual foundation and how she’s created The Triple Win. The Triple Win is when true synergy and values alignment occurs between those who invest, those who do and those who benefit. Its lives transformed. Danita, will explore avenues to creating synergy between the stakeholders in philanthropy for the benefit of all.

Today the small home and 14 children have grown to a campus with 8 orphan care homes, housing nearly 100 children. In addition to the orphanage, Danita’s Children/Hope for Haiti Children’s Center Inc. is now functioning as a school which educates over 300 children each year, a church that helps meet the spiritual needs of the community, and most recently, a Children’s Medical Center open to all children of Haiti.

Gen Z: What is the Impact of a Generation Raised in a Digital World?

Lisa Niemeier, Founder and Managing Member of graymatter Strategies LLC and PPI’s Dean of Generational Impact
Jamie Weiner, Psy.D., Principal and Co-Founder, Inheriting Wisdom

“What adults can learn from Kids,” a TED talk by a Gen Z member, captures this generation’s desire to impact the world. As they view technology as commonplace, they have the power to utilize this to change family and business relationships. Through interactive exercises focused on Generational Thinking, this workshop questions our approaches to the governance and wealth transfer tools designed with top-down approaches.

This workshop will question our understanding of generations, as well as ask how will we face the challenges of planning in a world where five generations may be alive at the same time.

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