

# 2015 Rendezvous

August 5<sup>th</sup> – 7<sup>th</sup>, 2015

Omni Interlocken Hotel & Resort • Broomfield, CO



## Agenda & Breakout Session Schedule

Wednesday, August 5 <sup>th</sup>			
9:00am	3:00pm	Optional Workshop - Purposeful & Collaborative Consulting: The Legacy Roadmaps Process, Dean Fowler, PhD	Alder
3:00pm	5:30pm	Research Expedition	Birch
9:30am		Golf Tournament	
1:00pm	5:00pm	Early Registration / Information Table	Lobby
5:30pm	6:00pm	Cash Bar	Pavilion
6:00pm	8:00pm	Dinner & Opening Activities	Pavilion
Thursday, August 6 <sup>th</sup>			
7:00am	8:00am	Breakfast	Taproom/Terrace
8:00am	8:10am	Opening Meditation, Stephanie West Allen, JD, Dean of Neuroscience and Contemplative Practices	Interlocken AB
8:10am	8:30am	State of PPI Address, John A. Warnick, Esq.	Interlocken AB
8:30am	9:30am	Developing an Innovation Mindset as a Prerequisite to Mastery, Ian McDermott, PPI Dean of Innovation & Learning	Interlocken AB
9:30am	10:15am	Reflections & Integration Exercise	Interlocken AB
10:15am	10:45am	Break	Interlocken Foyer
>>Breakout Sessions			
10:45am	Noon	Key Learnings and Strategies From Two Decades of Initiating and Facilitating Family Meetings, Stephen Goldbart, PhD, Joan DiFuria, MFT	Interlocken C
10:45am	Noon	A Comprehensive Model for a Humane Trustscape, Hartley Goldstone, JD, MBA	Interlocken D
10:45am	Noon	Connected for Good , John Stanley	Pine
10:45am	Noon	Beyond Collaboration - Advisory Team Coordination as a Specialty Profession, James F. Thomas, Jr., CFP®, CLU, ChFC	Spruce
10:45am	Noon	Polarity Thinking - The Best Idea You've Never Heard Of, Daniel P. Felix, JD & Neesa Sweet, PACT	Fir
10:45am	Noon	The Power of Presence, Arielle Nobile and Melissa Hoyer, CFP®, CPCC	Birch
Noon	1:00 PM	Lunch	Taproom/Terrace
>>Breakout Sessions			
1:00pm	2:15pm	The Family Champion: The Role of Rising Generation Leadership, Dennis T. Jaffe, PhD, Joshua Nacht, Andrew Pitcairn	Interlocken C
1:00pm	2:15pm	Significance and Success, Jack Beauregard	Interlocken D
1:00pm	2:15pm	Personalized Philanthropy, Timothy J. Belber, JD, AEP®, Phil Cubeta, MSFS, CLU®, ChFC®, CAP®, Steven Meyers, PhD	Pine
1:00pm	2:15pm	When Governance is Not Enough: What's Really Going on Behind the Money, Dr. James Weiner & Dr. Carolyn Friend	Spruce

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1:00pm	2:15pm	Reveal or Conceal: A High Stakes Game for the Whole Family, Karen Laprade, FEA & Kyle Harrison, CFA, FEA	Fir
1:00pm	2:15pm	When is Life Insurance Useful, Richard Harris, CLU, AEP, TEP	Birch
2:15pm	2:45pm	Break	Interlocken Foyer
>>Breakout Sessions			
2:45pm	4:00pm	Collaboration in Action: PPI Members Join Forces, Stacy Allred, MST, Mary K. Duke, JD, Mark Hartnett, JD, CFP®, AEP®	Interlocken C
2:45pm	4:00pm	Working Effectively with Widows: Practical Tips to Reach Out & Serve These Women, Kathleen M. Rehl, PhD, CFP®, CFT™	Interlocken D
2:45pm	4:00pm	Love and Money: Ensuring a Successful Transition into Marriage, Nathan Dungan	Pine
2:45pm	4:00pm	Establishing Family Governance Structures Guided by Bowen Family Systems Theory, Elaine King, CFP® & Mariana Martinez, PsyD	Spruce
2:45pm	4:00pm	The Cabin: Architecting a Family-of-Affinity Office, Myra Salzer, CFP® & Rob Gordon	Fir
2:45pm	4:00pm	Beyond the Family Tree: Exploring Family History through Genograms, Karen McNeill & Amy Zehnder, PhD	Birch
4:00pm	4:15pm	Break	Interlocken Foyer
4:15pm	5:30pm	Plenary Panel Discussion: Fiscal Unequals in Relationships, James E. Hughes, Jr., Joanie Bronfman, PhD, Stacy Allred, MST Moderated by John A. Warnick, Esq.	Interlocken AB
6:30pm	8:00pm	Dutch Treat Dinner Groups (Optional)	Local Restaurants
<b>Friday, August 7<sup>th</sup></b>			
7:00am	8:00am	Breakfast	Taproom/Terrace
8:00am	8:30am	The Future of PPI, John A. Warnick, Esq.	Interlocken AB
8:30am	9:30am	Upshift: Unleashing the Transformative Power of Family Culture, Matthew Wesley, JD, MDiv, PPI Dean of Family Systems	Interlocken AB
9:30am	10:15am	Reflections & Integration Exercise	Interlocken AB
10:15am	10:45am	Break	Interlocken Foyer
>>Breakout Sessions			
10:45am	Noon	Family Flash Points: Helping Families Resolve Conflict, Stacy Allred, MST & Dennis T. Jaffe, PhD	Interlocken C
10:45am	Noon	Family Philanthropy: What Works and What Doesn't, Deborah Goldstein, Justin T. Miller, JD, LL.M., TEP, CFP	Interlocken D
10:45am	Noon	Leading When Triggered, Cathy Carroll, MBA, ACC	Pine
10:45am	Noon	Developing Leadership in the Rising Generations, Rodney Zeeb	Spruce
10:45am	Noon	Balancing the Emotional Ledger; Axioms and Guidelines for Counseling Families in Business, Joe Paul,	Fir
10:45am	Noon	Embracing Conflict, Terri Finney, PsyD	Birch

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12:00pm	1:00pm	Closing Ceremony & Lunch	Pavilion
1:00pm	4:00pm	Open Space / Affinity Table Discussions	Interlocken AB
1:00pm	4:00pm	Hike at Chautauqua Park in Boulder	
1:00pm	6:00pm	Optional Workshop – The Values Advantage™ Values Consultant Training/Certification Program, Gunther Weil, PhD	Boardroom
<b>Saturday, August 8th</b>			
9:00am	5:00pm	Optional Workshop Continued – The Values Advantage™ Values Consultant Training/Certification Program, Gunther Weil, PhD	Boardroom

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