Welcome to RendeZoom!

We are excited to announce the 2020 Rendezvous & Fusion is going virtual! We are committed to delivering a high-quality, engaging, and inspiring virtual event. It is more than a series of webinars - it is an experience that provides opportunities to connect and engage while accessing innovative and cutting-edge topics.

**Rendezvous is STILL the premier and most professionally diverse gathering of its kind. The 2020 Virtual Rendezvous & Fusion** 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.

Our Fusion track is for attendees who want to maintain a leading edge in technical topics and obtain CLE/CPE credit with nationally renowned faculty while maintaining full access to Rendezvous.

Topics Include:

- Family Dynamics & Culture
- Family Governance & Leadership
- Philanthropy, Stewardship & Legacy
- Professional Collaboration
- Personal Development & Growth
- Cutting Edge Legal & Tax Topics
- Trustscape & Financial Planning
PLANNING EXPEDITIONS

The quality of RendeZoom 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

Sandi Bragar, CFP, Director, Wealth Management, Principal, Aspiriant
Cathy Carroll, MBA, Founder, Legacy Onward
Mark C. Hartnett, J.D., MBA, CFP®, AEP®, Managing Director, Argent Family Wealth Services
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, Author of the Purposeful Trust & Gift Handbook
Matthew Wesley, JD, MDiv, Managing Director, Merrill Center for Family Wealth™, PPI Dean of Family Culture

Wisdom Expedition

Doug Baumoel, MBA, Partner, Continuity Family Business Consulting
Nathan Dungan, Founder and President of Share Save Spend
Jamie Forbes, Partner, Forbes Legacy Advisors
Kristen Heaney, MSW, BCC, Legacy Consultant, Legacy Capitals, LLC
Steve Legler, MBA, CFA, FEA, Family Legacy Advisor, TSI Heritage
Scott Mathewson, CFP®, Founder, Elevare 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

Experience Expedition

Gregg Ballew, CFA, CIMA, Senior Vice President, Westwood Wealth Management
Sandi Bragar, CFP, Director, Wealth Management, Principal, Aspiriant
Jenna Gatto, LMFT, Vice President, Merrill Center for Family Wealth™
Ella Chase Hyland, Co-Founder, Wellth-Works
Kaley Fennell, Junior Associate, Legacy Capitals, LLC
Jen Laun, CFP®, Healthy Human Being Advocate
Jeff Savlov, CAP, Founder, Blum & Savlov, LLP - Family Business & Wealth Consulting

THANK YOU to the 2020 RendeZoom Sponsors!

Platinum Level

Gold Level

Silver Level

Limited sponsorship opportunities are still available. Please contact us for more information.
REGISTRATION DETAILS
Member Rate: $495
Non-Member Rate: $695

NETWORKING EVENTS & SOCIAL ACTIVITIES

Rendez-Celebration!
Monday, July 20th at 3:30pm – 5:00pm MT
Join us for a fun and engaging reception to kick off the 2020 RendeZoom! Attendees will have an opportunity to connect with others in small group discussions. There will also be entertainment and a couple of fun surprises! This is also a great time to ask questions about the event and the agenda for the week.

Rendez-Café
Wednesday – Thursday – Friday at 8:30am – 9:30am MT
Welcome to Rendez-Café! Grab some coffee (or your favorite beverage) and join us for a virtual Roundtable Discussion (aka Table of Affinity) designed to give attendees the opportunity to connect and engage with others around a specific topic. These are intended to be informal small-group discussions (a host will be assigned to facilitate the conversation). There is no need to pre-register. Just show up at the designated time and select from a variety of fun and engaging table topics (topics will be posted in advance).

Rendez-MOVE!
Tuesday & Thursday at 11:45am – 12:45pm MT
Rendezvous is known for being a place where professionals can make enduring connections and deepen existing relationships during extended networking breaks. Our optional (but highly recommended) Rendez-MOVE! breaks are designed to offer space for attendees to connect, engage and move their minds and/or their spirits. Join us for guided meditation, stretching, dance, brain games, and more! Or plan in advance to take this time to go for a walk and connect with your PPI colleagues by phone. If you plan to login, arrive promptly so you don’t miss out on the fun!

Emergent Conversations
Wednesday at 11:45am – 12:45pm MT
2020 is a year none of us will forget! Please join us for this opportunity to come together as one community and, in small groups, to reflect on the key learnings we can take forward for both ourselves and the families we serve.

Rendez-Lounge
Tuesday at 4:30pm – 6:00pm MT; Wednesday at 6:00pm – 7:30pm MT; Thursday at 5:15 – 6:45pm MT
One of the most consistently highest rated experiences at Rendezvous is the Dutch Treat Dinner Groups (now Rendez-Lounge). These small groups are thoughtfully and purposefully assigned by John A. Warnick and are designed to provide a small group networking / social / community-building experience. 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 during RendeZoom. You may pick one Rendez-Lounge to join; advanced registration is required (we’ll email you a registration link in early July).
### Monday, July 20th

<table>
<thead>
<tr>
<th>Time</th>
<th>Schedule</th>
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<tbody>
<tr>
<td>1:00 pm</td>
<td>Welcome and Introduction to RendeZoom</td>
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<tr>
<td>1:30 pm</td>
<td>Keynote: The Vulnerability of Service  David Whyte</td>
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<tr>
<td>3:30 pm</td>
<td>Rendez-CEREMATION!  Don’t Miss the Party</td>
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### Tuesday, July 21st

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>10:00 am</td>
<td>Purposeful Pivots I  Moderated by Courtney Pullen</td>
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<tr>
<td>11:45 am</td>
<td>Rendez-MOVE!  Connect, Engage &amp; Move (Your Mind, Body, and Spirit)</td>
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<tr>
<td>1:00 pm</td>
<td>Breakout Sessions</td>
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<tr>
<td>1:00 pm</td>
<td>Unblocking What’s Waiting for You: Discovering and Overcoming What</td>
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<tr>
<td></td>
<td>Holds us Back from Developing New Capabilities  Cathy Carroll, MBA, PCC,</td>
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<td></td>
<td>Courtney Pullen, M.A.</td>
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<td>Changemakers in a Time of Crisis  Tony Macklin, CAP, Dien Yuen, JD, CAP &amp;</td>
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<td>Crysti Chen</td>
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<td>Drafting to Improve Wellbeing: Imbuing Trusts with Positivity, Meaning</td>
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<td></td>
<td>and Purpose  Richard S. Franklin, Esq. (Fusion)</td>
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<td>Purposeful Planning for the 99.99%  Ron Nakamoto, CFP, Bob Clark, CFP,</td>
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<td></td>
<td>CPWA, CIMA &amp; Erik Gabrielson (Fusion)</td>
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<tr>
<td>4:30 pm</td>
<td>Rendez-Lounge  Small Group Networking/Social/Community Building Experience</td>
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### Wednesday, July 22nd

<table>
<thead>
<tr>
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<tr>
<td>8:30 am</td>
<td>Rendez-Café  Bring Your Mug, We’ll Provide the Comaraderie!</td>
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<tr>
<td>10:00 am</td>
<td>FRED Talks  Let’s Get Real; Dying to Talk; Racial Inequality – Where is MLK’s Dream</td>
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<tr>
<td>11:45 am</td>
<td>Emergent Conversations  Facilitated by Ian McDermott</td>
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<tr>
<td>1:00 pm</td>
<td>Breakout Sessions</td>
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<tr>
<td></td>
<td>Evoking Clients’ Own Motivation for Change with Motivational Interviewing</td>
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<td></td>
<td>Joseph Kuo, CFP, CMA, Ju-Lu Huang Kuo, MA, Marlis Jansen, LMFT, FBS</td>
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<td>&amp; Kjartan Jansen, MA, CFA</td>
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<td>The XX Factor - Is She Being Understood: Assessing Our Engagement</td>
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<td></td>
<td>with Female Clients &amp; Colleagues Across All Generations  Emily Bouchard,</td>
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<td>Amy Zehnder, Ph.D., PCC, CFBA, Karen McNeil</td>
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## Wednesday, July 22nd Cont.

<table>
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<tr>
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<tr>
<td>8:30 am</td>
<td><strong>Building Authentic Connection — The Stories from our Past Weave a</strong></td>
<td><strong>Vision for the Future</strong> Peter Johnson, CFP, Jon Young, Lonner Holden</td>
</tr>
<tr>
<td>10:00 am</td>
<td><strong>Benevolence: The Goal Standard of Estate Planning</strong></td>
<td>Raymond C. Odom, Esq. (Fusion)</td>
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<tr>
<td>6:00 pm</td>
<td><strong>Rendez-Lounge</strong></td>
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## Thursday, July 23rd

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<td>Moderated by Courtney Pullen, MA</td>
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<td><strong>Rendez-MOVE!</strong></td>
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<td><strong>What Keeps the Rising Generation Up at Night: Practical Insights to</strong></td>
<td>Help Address their Top Three Questions</td>
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<td>Valerie Galinskaya, MBA, Jenna Gatto, Student, LMFT &amp; Phoebe Massey, BA</td>
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<tr>
<td>1:00 pm</td>
<td><strong>Descendants and Dilemmas: Unpacking the Role of a Family Fiduciary</strong></td>
<td>Kirby Rosplock, PhD, Jeff Crawford, PhD</td>
</tr>
<tr>
<td>5:15 pm</td>
<td><strong>Rendez-Lounge</strong></td>
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## Friday, July 24th

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<tr>
<td>10:00 am</td>
<td><strong>Power Sessions</strong> (Choose One)</td>
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<tr>
<td>12:00 pm</td>
<td><strong>The Future of Our Work</strong></td>
<td>Matthew Wesley, JD, MDiv</td>
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### Save the Dates!

July 20-22, 2021 • July 19-21, 2022 • Four Seasons Hotel | Downtown Denver
Opening Our Hands: A Brief Look at The Vulnerabilities of Giving
David Whyte
We usually associate any sense of vulnerability with those we are trying to help through our giving, partly because we unconsciously associate vulnerability with a form of weakness and the giver as having the power as well as the wherewithal. Join poet and philosopher David Whyte, for a look at the actual vulnerabilities that are involved in being the giver, or the sincere helper to the giver, and for a redefinition of vulnerability, not as weakness, but as a kind of doorway through which we go to make any relationship between giver and receiver deeper and more enduring.

Purposeful Pivots
Courtney Pullen, MA (Moderator)
Robert Heinrich, CFP, JD CeFT, L. Paul Hood, Jr., JD, Katie Spencer, PsyD, Thomasina Williams, JD
We are experiencing a Heat Moment; an unexpected happening that changes the paradigm. Heat Moments can provoke the kind of reflection that leads to purposeful pivots. Hear four wholehearted stories of professionals who have made courageous, purposeful pivots in their professional careers based on unexpected personal discoveries. With these inspiring stories, you will be invited to reflect on your purposeful pivots and new purposeful pivots that may be emerging for you.

The Many Faces of Impairment
Phoenix Adams, Arden O’Connor, Amanda Koplin, LPC, Joanna Gordon Martin
The news is rife with cautionary tales of celebrity impairment. What the tales don’t reveal is that one individual’s impairment has the potential to reverberate through the lives of those close to them. While impairment is typically associated with Substance Use Disorders, a broader definition includes the decline and changes accompanying aging, problem gambling, sexual compulsivity, spending, eating disorders and other compulsive behaviors that can interrupt healthy family and organizational functioning. Please join this panel of PPI experts as they articulate the ways impairment presents, the common responses, and take-away tools that can be utilized when facing these issues.

What Really Works? Tapping the Wisdom of 100-Year Old Global Family Enterprises
Dennis Jaffe, PhD
The core problem for advisors is how to help family enterprises survive and thrive in the face of internal and external challenges. In this session, we’ll share stories and wisdom learned from interviews with 100 successful global families who have lasted beyond their 3rd generation as they report on what they did to evolve and adapt successful across generations. The purpose is to help advisors learn how these practices develop and how to introduce them into their family clients. Our research reports their own stories, reflections and activities as they evolve across multiple generations. Their stories help advisors and families make choices in their first and second generation that can set them on a long-term path for success.

An Interview about The Future of Our Work
Matthew Wesley, JD, MDiv
Purposeful work with families has significantly progressed over the last three decades. We embarked as a pioneering profession and, over time, developed a body of knowledge and repertoire of techniques. Some of this work has stood the test of time and some has not. To complicate matters, the world around us has dramatically shifted. In a panoramic interview, Cathy Carroll will explore with Matt Wesley the practical question each of us must ask ourselves: “What is required of me as I evolve into the
emergent edge of this professional horizon?” Last year we looked at the future of the profession, this year we will look at the future of the work itself. This interview promises to challenge assumptions, offer insights, and inspire catalytic action.

Let’s Get Real
Jamie Forbes, CAP®
In our work, we so often get held up by fear. Fear of being perceived as weak because we are vulnerable. We are easily distracted by the tangible details in our work: the money and financial assets. Yet we spend the least time on what matters most to people: relationships. Our clients often need help re-focusing on these intangible things that they really care about. Sometimes it helps them get there faster when we are willing to lead them into that process by sharing pieces of ourselves. This is easy to say and very challenging to do. When we do it well, we do our best work.

Dying to Talk
Dawn M. Gross, MD, PhD
Talking about death is taboo. We wait for permission. Stories draw people into what we tend to avoid. Why? Because, in the end (pun intended), death is actually for the living. This universal human experience has the power to inform our lives and focus our priorities so we can shape and define our legacies. Telling stories gives each of us permission to speak freely right now. And once we begin, we soon discover that we are not alone. People are dying to talk about what matters most. All we need to do is listen.

Racial Inequality – Where is MLK’s Dream Today?
Jeff Savlov
Race is a complex and emotionally loaded topic. Our society contains inherent and longstanding inequalities based on race which can be difficult to discuss and are often avoided. We can’t improve what we can’t openly acknowledge. As our community gives careful thought to these complex dynamics, we can bring more conscious intent to our decisions and behaviors. This FRED talk will use examples from the media and the speaker’s personal life to help attendees consider racial inequality, how it affects them, how they may unwittingly perpetuate it and opportunities to incorporate a Purposeful mindset in seeking out ways to ameliorate the injustice.

Fostering Resilience & Love in Family Systems
Jon Young
The family context offers vast, untapped opportunities for increased connection. Utilizing age-old transformative practices that literally reshape our neurobiology, over time we can consciously transform unhealthy and disconnective patterns into predictably positive outcomes. The results from these simple practices and shared experiences —in local and backyard nature — include increased personal resilience, and a greater capacity for love and understanding. These outcomes are achieved through awakening the senses and sensory integration through story sharing about common contexts in the natural world.
Building Authentic Connection — The Stories from our Past Weave a Vision for the Future

Peter Johnson, CFP, Jon Young, Lonner Holden

PPI members aim to equip families for the most challenging life passage of all: generational transition. To be successful, this process requires individuals and family systems to be high-functioning, aware, adaptive and skilled.

In this interactive session, we explore proven and highly practical pathways to authentic connection — with self, nature and others — that help build a dynamic capacity for attributes that include self-confidence and curiosity, kindness and creativity.

Connection is our birthright, and a necessity for the healthy functioning of individuals, families and communities. When we explore it, we draw closer to the meaning of our ancestry and heritage, while building regenerative capacity to continuously adapt to, and create, a meaningful future.

Changemakers in a Time of Crisis

Tony Macklin, CAP, Dien Yuen, JD, CAP & Crysti Chen

The current pandemic and economic downturn brought new challenges and opportunities for donors, funders, and other changemakers. How are they responding and what could come next? How are rising generations making a difference with a broader toolkit – advocacy, impact investing, crowdfunding, international development, starting a B Corp, and even tax-deductible gifts when charities actually earn their trust? And, how can we better support our clients of all ages in navigating the challenging times ahead? Join two young-at-heart advisors and a young changemaker as they discuss honest answers based both on real-life experiences and trends they’re watching.

Descendants and Dilemmas: Unpacking the Role of a Family Fiduciary

Kirby Rosplock, PhD, Jeff Crawford, PhD

During this interactive session, Jeff, a family member trustee and Kirby, also a family member trustee, fiduciary, author, educator and PPI Dean will unpack the opportunities and dilemmas faced by family members who sit in a fiduciary role. Utilizing clips from the film, “The Descendants” about the sole trustee of a Hawaii dynastic trust, we will review issues, experiences and dilemmas encountered by family members in a fiduciary role. Audience participation will be encouraged through break-out mini-reflections. Jeff and Kirby will share their own personal and professional experiences as trustees and capture the views, wisdom, and experiences of the audience.

Evoking Clients’ Own Motivation for Change with Motivational Interviewing

Joseph Kuo, CFP, CMA, Ju-Lu Huang Kuo, MA, Marlis Jansen, LMFT, FBS & Kjartan Jansen, MA, CFA

Within us exist the subconscious angel and devil arguing over the decisions we make in life. When advisors take the role of “angel”, they often keep clients stuck and away from their financial and life goals because clients end up playing the role of “devil’s advocate”. Motivational Interviewing is a conversational style that guides clients toward their desired behavioral changes with clients arguing for the desired changes themselves. This is an evidence-based process that evokes the clients’ OWN MOTIVATIONS for change. Join us for an interactive session where you can try out some of the key elements of Motivational Interviewing.
2020 Breakout Sessions

The Business of Our Practices
Josh Patrick, CFP®, John A. Warnick, Esq.

PPI has come a long, long way. But in its early years many PPI members were eager to learn how they could make their practices (whether it was technical or qualitative) more prosperous and sustainable. Led by PPI member Rick McDonald, with help from John A., Julie and a couple of other very committed PPI members, we created a survey to assess the state of the Business of the Business. We posed 35 questions designed to explore how much traction PPI members were getting in their efforts to create Purposeful practices and where they were experiencing both their greatest challenges and greatest successes. The results of this survey were then collected and shared with the attendees of a highly interactive session that brought more than 60 people into the room. Since that session in 2014 the challenge to create thriving and sustainable practices remains. PPI spends most of its time exploring the quiet evolution of best practices for legacy families and families in business, in their deepest and broadest contexts. This session will attempt to both assess and address the everyday business challenges which face PPI members. While it may be of primary interest to the self-employed PPI member, it may also be useful to a PPI member who is looking to leave a secure position in an institutional world to plunge into the unknowns of consulting or private practice.

Purposeful Planning for the 99.99%
Ron Nakamoto, CFP, Bob Clark, CFP, CPWA, CIMA & Erik Gabrielson

Several case studies giving participants the experience of being part of multi-disciplinary, purposeful planning collaborations to help several non-UHN families with aspirations and concerns representative of “the rest of us”. Wealth management, developing and sustaining family leadership, business transitions, and optimizing collaboration will be highlighted.

The XX Factor - Is She Being Understood: Assessing Our Engagement with Female Clients & Colleagues Across All Generations
Emily Bouchard, MSSW, Amy Zehnder, Ph.D., PCC, CFBA, Karen McNeil, PhD

On this tenth anniversary of Rendezvous gatherings (and centennial celebration of the 19th Amendment!), it’s time to take stock. Where are we succeeding in connecting with the people we serve who identify as women? How can we improve? After introducing historical data and current research, we’ll discuss what we’ve all learned over the last decade and what new approaches we see are needed going forward. Bring your best - and worst - case studies to augment those we will provide from comprehensive research findings. Attendees leave equipped to contribute in even more meaningful ways with their female-identified clients and colleagues.

Unblocking What’s Waiting for You: Discovering and Overcoming What Holds us Back from Developing New Capabilities
Cathy Carroll, MBA, PCC, Courtney Pullen, M.A.

Human development is riddled with polarities such as candor & diplomacy, achieving & learning, bold & humble, data-driven & intuitive, just to name a few. Due to our innate pole preferences, it requires courage to develop our non-preferenced pole. In this session, participants will choose an underdeveloped capability, then explore emotionally and somatically, what’s blocking our development of this capacity. Highly interactive and experiential, this curious exploration is easily replicated for oneself and more importantly, for clients who are struggling with a new capability they want to grow for themselves.
What Keeps the Rising Generation Up at Night: Practical Insights to Help Address the Top Three Questions

Valerie Galinskaya, MBA, Jenna Gatto, LMFT & Phoebe Massey, BA

Please join us for an interactive session in which we will share insights gleaned from over 1,000 UHNW rising generation members as to their top questions and concerns. We will highlight client case studies and specific tools to help you apply the insights with your clients and families. You will come away from the session with a clearer view of what keeps rising generation members up at night, and practical ideas on how you can help them navigate this complexity (and reclaim the REM cycle).

Drafting to Improve Wellbeing: Imbuing Trusts with Positivity, Meaning and Purpose

Richard S. Franklin, Esq.

In this program, Richard Franklin will provide ideas, examples and language to prepare trusts and other estate planning documents that are designed to improve well-being. He will show how to build positivity, meaning and purpose into trusts, using positive psychology’s empirical research and other data to support family well-being and flourishing. Richard will provide a model for trustees to use in building a well-being baseline and beyond, and provide ideas for creating charitable trusts and plans that improve well-being by recognizing the importance of individual autonomy and self-determination. Richard has coined the term “Prince Charles Effect” and he will explain the life-expectancy data behind it and why this data points to having a lifetime transition of wealth to improve well-being. The program will also provide ideas for professional trustees and discuss how families should measure the trustee’s performance based on whether they actually improve beneficiary well-being and flourishing.

Benevolence: The Goal Standard of Estate Planning

Raymond C. Odom, Esq.

If a client were to spend $50,000 on a car she would drive the car in order to enjoy it. If a family spent $50,000 on a home addition blueprint, they would build and live in it in order to “enjoy” the blueprint. If a client spends $50,000 on estate planning they would . . . die . . . in order to enjoy it? The point is that death is not a goal. And since we now all know that saving taxes is not the goal either what is the goal of estate planning? Benevolence!

This presentation will reset the context for all gifts by closely examining the word that describes all recipients of a gift. That word is beneficiary. This common word will open up a compelling process and a universally profound purpose for all gifting that allows wealth owners to put family and charity on the same side of the table. And more importantly allows the advisor and client to be successful in a scientifically measurable way. This presentation will use the ordinary process of lifetime wealth transfer to create an extraordinary purpose for gifts at death. A purpose so compelling every individual can experience the happiness of accomplishing a lifetime goal that outlives life.

Ten Years of the Financial Skills Trust: Notes from the Field

Timothy J. Belber, JD, AEP, James Grubman, PhD

Since the introduction of Financial Skills Trust in 2010, the language has become a core part of hundreds of trusts. Join one the creators of the language and the concept, James Grubman PhD, and practitioner Timothy Belber JD AEP for a practical session on the concepts, when and how to use the Financial Skills Trust, and the practical lessons learned over the past decade about implementation with clients.