Innovation is driven by need and now is no different. Learn from thought leaders in your field to work together to meet the current and new needs of clients. We invite you to join us and explore how to thrive, rather than just survive, during these turbulent times. At RendeZoom, you will converge with leaders to advance greater purpose and meaning with the families you serve.

The Purposeful Planning Institute (PPI) provides members with clear processes and effective practice methods to provide their clients with the finest service. Members include financial advisors, estate planning attorneys and other professionals and consultants that serve families of wealth and families in business. Members are able to access our innovative and cutting edge techniques through our educational content, weekly interviews with thought leaders, programs, events, training and more.

Topics Include:

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

Presented by the

Purposeful Planning Institute

4600 S. Syracuse, 9th Floor Denver, Colorado 80237 | 720-458-7777 | info@purposefulplanninginstitute.com
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
Steve Legler, MBA, CFA, FEA, Family Legacy Coach & Advisor at TSI Heritage
Melissa Mitchell-Blitch, Founder of Eredita Consulting, Author & PPI Dean of Individual Development
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
Amanda Koplin, CEO of Koplin Consulting
Steve Legler, MBA, CFA, FEA, Family Legacy Advisor, TSI Heritage
Scott Mathewson, CFP®, Founder, Elevare LLC
Shilpa Mirchandani, Senior Wealth Planner, Senior Vice President at City National Bank
Michelle Osry, Partner, Canadian Practice Leader, Family Enterprise Consulting at Deloitte Canada
Jeff Savlov, CAP, Founder, Blum & Savlov, LLP - Family Business & Wealth Consulting

Experience Expedition
Mary Anderson, Program Director of Advanced Legal Training Institute
Sandi Bragar, CFP, Director, Wealth Management, Principal, Aspiriant
Ella Chase Hyland, Co-Founder, Wellth-Works
Kaley Fennell, Junior Associate, Legacy Capitals, LLC
Marlis Jansen, Founder & CEO of Graddha LLC
Jennifer Laun, CFP®, Healthy Human Being Advocate
Lisa Orlick-Salk, PCC, Coach & Consultant at Lisa Orlick Coaching & Consulting, LLC
Jeff Savlov, CAP, Founder, Blum & Savlov, LLP - Family Business & Wealth Consulting

THANK YOU to the 2021 RendeZoom Sponsors!

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Limited sponsorship opportunities are still available. Please contact us for more information.
REGISTRATION DETAILS
Member Rate: $695 ($795 after June 7th)
Non-Member Rate: $895 ($995 after June 7th)

Not a member? We’ve got you covered. Register now and you’ll have the option of adding an annual membership for 50% off!
Register at https://purposefulplanninginstitute.com/2021-rendezoom.

NETWORKING EVENTS & SOCIAL ACTIVITIES

Rendez-Inspire
Designed to allow attendees to connect and engage as we explore courageous resilience through art, body, and mind.

Purposeful Pathways
During these brief main stage presentations, we will hear from colleagues whose purposeful choices have made a significant impact on their work individually and across our industry as a whole.

Rendez-Crew
RendeZoom is known for being a place where professionals can make enduring connections and deepen existing relationships during extended networking breaks. Rendez-Crew offers you an opportunity to join a small group of participants and gather with your “Crew” at the end of each day to discuss and digest the day’s events.

Rendez-Experience
This is an experience you won’t want to miss! Join us as we explore and experience the sound of courageous resilience as a community of kindred purposeful spirits.

Rendez-Cafe
Grab your favorite beverage and join us for a virtual Roundtable Discussion 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. 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.

Rendez-Celebration
Join us for this fun and engaging wrap-up to 2021 RendeZoom! This closing session will tie a bow on this year’s gathering, and leave us all looking forward to being together again in 2022.

Visit purposefulplanninginstitute.com/2021-rendezoom for more information.
## Wednesday, July 21st

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>9:00 am</td>
<td>Welcome &amp; Opening Remarks</td>
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</table>
| 9:15 am    | Positive Psychology in Challenging Times  
*James Pawelski, PhD* |
| 11:15 am   | Rendez-Inspire  
*Connect and Engage* |
| 12:30 pm   | Purposeful Pathways  
*Barb Culver, CFP, ChFC, CLU, AEP & Jim Coutré* |

### Breakout Sessions

<table>
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<tr>
<th>Time</th>
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| 1:45 pm    | Navigating High Emotions: How to Equip and Coach Family Members for More Effective Problem-Solving  
*Jeff Strese, CFWA, CFBA* |
| 1:45 pm    | Notes from the “Frontline”: The Nice Family: Handing Over the Baton with an Iron Fist  
*Stephen Golbart, PhD & Joan DiFuria, MFT* |
| 1:45 pm    | Hidden and Hindered: Empowering RisingGen Clients to Reframe Their Shame  
*Kristen Heaney, MSW, BCC, Richard Orland, PhD & Kaley Fennel* |
| 1:45 pm    | How Can Advisors Learn to Lean into Conflict, With Confidence?  
*Jane Beddall, MA, JD, Betsy Erickson & Steve Legler, MBA, CFA, FEA* |
| 1:45 pm    | Communicating Love & Finding True Wealth  
*Paul Puccinelli, LMFT, MS, Dawn Gross, MD, PhD & Ron Nakamoto, MBA* |
| 3:30 pm    | Rendez-Crew  
*Small Group Networking/Social/Community Building Experience* |
| 4:30 pm    | Rendez-Experience  
*The Social Kick-Off of RendeZoom 2021* |

## Thursday, July 22nd

<table>
<thead>
<tr>
<th>Time</th>
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</table>
| 9:00 am    | Rendez-Café  
*Grab your favorite beverage for a roundtable discussion.* |
| 10:30 am   | Positive Psychology - Wealth 3.0 in Action  
*Kristin Keffeler, MSM, MAPP* |
| 12:00 pm   | Rendez-Inspire                                                        |

### Breakout Sessions

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| 1:15 pm    | “You Don’t Know Me!”... and Other Generational Snags with the Great Wealth Transfer  
*Emily Rustemeyer, MA & Amy Szostak* |
| 1:15 pm    | Building Rapport, Reinforcing Strengths, and Evoking Motivation: The Subtle World of Reflective Listening  
*Joseph Kuo, CFP, CMA* |
| 1:15 pm    | A Look in the Mirror: Understanding and Overcoming Barriers to Healthy Boundaries  
*Melissa Mitchell-Blitch, MS, MA* |

Continued on next page.
### Thursday, July 22nd Cont.

<table>
<thead>
<tr>
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<tr>
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<td><strong>The Test of Resilience: Emerging from Turbulence</strong></td>
<td>Matthew Wesley, JD, MDiv &amp; Valerie Galinskaya, MBA</td>
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<td>1:15 pm</td>
<td><strong>Wake up Karen: How to Best Address Conscious and Unconscious Biases</strong></td>
<td>Emily Bouchard, MSSW, Thomas Thiegs, MA &amp; Amanda Koplin, LPC</td>
</tr>
<tr>
<td>3:00 pm</td>
<td><strong>Rendez-Crew</strong> <em>Small Group Networking/Social/Community Building Experience</em></td>
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### Friday, July 23rd

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<tr>
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<tr>
<td>10:30 am</td>
<td><strong>Purposeful Pathways</strong></td>
<td>Joan DiFuria &amp; Stephen Golbart</td>
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<td>11:45 am</td>
<td><strong>Are The Stories That Help Us Thrive Being Overlooked?</strong></td>
<td>Ella Chase, Michelle Langdon &amp; Veronica Yepez, JD, MBA, TEP</td>
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<td><strong>The Family Factor—Measuring and Strengthening the Family Bond</strong></td>
<td>Doug Baumoel, MBA</td>
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<td><strong>Developmental Possibilities in the Aging Process</strong></td>
<td>Chris Wahl, MA.Ed</td>
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<td><strong>Pandemic and Purpose- Best Practices in Youth and Teen Philanthropy</strong></td>
<td>Sue Schwartzman, MA.Ed, Simon Shachter, PhD Candidate &amp; Rachel Levenson</td>
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<tr>
<td>1:30 pm</td>
<td><strong>The Path Before Us</strong></td>
<td>Stacy Allred Interviews James E. Hughes, Jr., Esq.</td>
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<tr>
<td>2:30 pm</td>
<td><strong>Rendez-Celebration</strong> <em>Closing Session</em></td>
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</tr>
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We will be announcing three Fusion Track sessions, which will qualify for continuing professional education for attorneys, CFPs, and other professionals. Check our website for updates.

### Save the Dates!

- July 18–22, 2022
- July 17–21, 2023
2021 FRED Talks On Demand

In addition to inspiring keynotes and interactive breakout sessions, RendeZoom attendees will have access to on-demand FRED Talks (Frank, Relevant, Educational, Dynamic) throughout the event. Plus, we’ll be offering opportunities for attendees to engage in small group discussions with the presenters on many of these topics during our Rendez-Cafe sessions.

How to Foster Post Traumatic Growth  Ian McDermott
How Do You Thrive?  Thomasina Williams, JD & Kathy Wisema, MBA
Families, Habits and Money: A Roadmap to Financial Wellbeing  Nathan Dungan
The Power of the Appropriate Next Question  Rod Zeeb
Grit is in the Soil: Understanding Psychological Fortitude through a “Living Systems” Perspective  Ross Ellenhorn, LICSW, PhD
How Philanthropy Can Impact Climate Change  Bruce Deboskey, JD
Closing The Performance Gap; Building Resilience  Courtney Pullen, MA
Leadership is Scalable  Brad Fisher
It’s all about the Pivot: Finding Unrealized Opportunities for Families and Caregivers as a result of COVID  Joanna Gordon Martin & Arden O’Connor

2021 Purposeful Pathways

During these brief main stage presentations, we will hear from colleagues whose purposeful choices have made a significant impact on their work individually and across our industry as a whole.”

Post-COVID Purposeful Planning
Barbara A. Culver, CFP, ChFC, CLU, AEP
Barb will share her key life and career decisions which led her to help influence the formation of the Purposeful Planning movement. She will then add insights to alter current practices due to COVID-19. In addition to suggesting new key questions to ask clients and their families, Barb will also recommend specific topics for advisors to add to their client conversations.

Do The Thing You Can Do
Jim Coutré, VP of Insights and Connections at Fidelity Faily Office Services
Leaning heavily into his mix of empathy, optimism and impatience, Jim shows up unapologetically as himself for his clients and our community. In doing so, he pushes aside the non-useful, clearing the way for a focus on the hard and messy work that has a positive impact on self, family and society - and reminding those around him that we are capable of and accountable for doing the same in whatever ways we can.

Gaining Family Perspectives in a Virtual World
Dennis T. Jaffe, PhD & Caroline Bailey, Founder and CEO Premier Growth
It has been 30 years since, Working with the Ones you Love, was published and the earliest version of FEAT—Family Enterprise Assessment Tool was launched. Since its development, different versions have been used to gather information from family members on their perception of the family and enterprise. FEAT has evolved to align with the changing needs of families, advisors, and the world at large. Join in this session on learnings from over 1000 global families who have used this online tool and how it can be used by advisors to get a baseline view of family dynamics and more.
Navigating High Emotions: How to Equip and Coach Family Members for More Effective Problem-Solving

Jeff Strese, CFWA, CFBA, Principal at Jeff Strese Consulting Group

Explore some best practices on equipping family members with communication and problem-solving skills... especially when high emotions emerge. This session will focus on effective strategies on how to influence the family culture and coach family members on these foundational skills - leveraging principles of effective communication, emotional intelligence and healthy family dynamics. How do you personally respond to high emotions? Can you be more prepared? Adult learning strategies alone can be ineffective if the practitioner is unprepared for high emotions in a family setting. This session will be a time to learn, reflect, and sharpen your own skills in a collaborative environment with your other PPI colleagues.

The Nice Family: Handing Over the Baton with an Iron Fist

Stephen Goldbart, PhD, Owner of Money, Meaning and Choices Institute & Joan DiFuria, MFT, Director and Co-Founder of Money, Meaning and Choice Institute

We will tell the story of the “Nice” family, a case study of a 4-generation family transitioning power from G2 to G3. A succession process had the blessing of G1, a true believer in planning, but found that handing over the reins was much harder on himself than he or his adult children had anticipated. It is a story of family love, loyalty, respect, control, fear, and rebellion. It is a story that shows how “the best intentions” can be side railed by individual and family dynamics that the family would rather “sweep under the rug”. In this open discussion with participants, we will share our three-year work journey with this family.

Hidden and Hindered: Empowering RisingGen Clients to Reframe their Shame

Kristen Heaney, MSW, BCC, Legacy Consultant at Legacy Capitals, Richard Orland, PhD & Kaley Fennel, Life Coach, Associate and Creative Coordinator at Legacy Capitals

This honest, interactive session explores an emotion that deeply inhibits Rising Generation family members’ ability to thrive. How can we as advisors empower our clients to navigate their feelings of shame? Facilitators present foundational shame theory, but then overlay it with the experience of the Rising Generation population by sharing a moving video, set to music, depicting real rising generation clients’ direct quotes that illustrate their struggles with shame. The remaining time will be spent in small group discussion, followed by a large group debrief, to process a written case study asking participants to consider actionable ways to help clients thrive in the midst of this turbulent emotion.

How Can Advisors Learn to Lean Into Conflict, With Confidence?

Jane Beddall, MA, JD, Founder and Principal of Dovetail Resolutions, LLC, Betsy Erickson, Senior Director of Philanthropy at Arabella Advisors & Steve Legler, MBA, CFA, FEA, Family Legacy Coach & Advisor at TSI Heritage

Conflict is a common occurrence in legacy families. Yet many advisors feel deeply uncomfortable with conflict. Attendees will be encouraged to overcome their discomfort by learning how to approach conflict with greater confidence. We will first share specific tools and ideas to deal with conflict without inflaming it, avoiding it, or denying it.

Next, through scenario role plays, participants will practice using and refining these tools to build their personal competence and comfort in dealing with conflict. With a few tools and some practice, advisors can build their confidence to better serve legacy families, even when conflict is present.
2021 Breakout Sessions

Communicating Love & Finding True Wealth

Paul Puccinelli, LMFT, MS, Next Generation Networking Specialist at AT&T, Dawn Gross, MD, PhD, Co-Founder/CEO Dyalogues, Inc. & Ron Nakamoto, MBA, Co-Founder of EW Plus, LLC

Volatile, uncertain, complex and ambiguous are salient words for today’s world. Yet you don’t need pandemics, social injustices or climate crises to invoke any of them. It is the world we live in, always. So how do you navigate what is most important to you when chaos ensues? This workshop will invite you to focus on something you’ve lost as a path to discovering and defining what you Love. Clarifying what is True Wealth for you will empower you to support the discovery of what True Wealth means to those you love and serve.

“You Don’t Know Me!”... and Other Generational Snags with the Great Wealth Transfer

Emily Rustemeyer, MA, VP and Wealth Planner, Northern Trust Corporation & Amy Szostak, Director of Family Education and Governance, Northern Trust Company

As advisory professionals, we are no strangers to the looming Great Wealth Transfer from older to younger generations. Time and time again, we have heard about the obstacles families encounter as they attempt consensus around a set of values and visions for the future. Many of these obstacles seem to stem from diversity of ages, experiences, and worldviews. This sounds like a recipe for complication... but what would it look like to view these generational dissimilarities as an opportunity for broadening the family’s vision? Join us as we reframe generational differences through an empathic, solutions-based lens and co-create tangible steps toward harmonious familial transitions.

Building Rapport, Reinforcing Strengths, and Evoking Motivation: The Subtle World of Reflective Listening

Joseph Kuo, CFP, CMA, Founder of Abundance Wealth Planning, LLC

As trusted advisors, we trust in the clients’ expertise in themselves and honor their autonomy. At the same time, when clients have articulated a direction they want to go but are stuck on their way, we can be guides. Through skillful use of reflections, we can help highlight clients’ strengths and reconnect them with their whys while reducing resistance in the way.

This workshop highlights how Motivational Interviewing uses complex reflections to evoke “change talk” and reduce “sustain talk.” Attendees will have opportunities to practice listening for change talk and experiment with reflections.

A Look in the Mirror: Understanding and Overcoming Barriers to Healthy Boundaries

Melissa Mitchell-Blitch, MS, MA, Founder of Eredita Consulting, Author & PPI Dean of Individual Development

We all have an Achilles’ heel when it comes to maintaining our boundaries – a situation or relationship in which it’s hard to use both our yes and our no. Maybe it’s a family member, a client, or our work. We know better, but sometimes struggle to put wisdom to work for us.

In this session, we’ll take a brave look in the mirror. A compassionate examination of what trips us up. Then we’ll consider what can help us get unstuck – and start building better boundaries in all areas of our life.
The Test of Resilience: Emerging from Turbulence
Matthew Wesley, JD, MDiv, Managing Director, Merrill Center for Family Wealth & Valerie Galinskaya, MBA, Managing Director, Merrill Center for Family Wealth

The world around us is emerging from an unprecedented time of turbulence. For our clients and their families, traversing the emergence from any transformation is filled with multiple possibilities, ranging from the triumphant to the tragic. The Merrill Center for Family Wealth has spent the last year focused on developing specific frameworks, techniques and tools that help families emerge from turbulence with greater resilience, wisdom, capacity and capability than they had before. From this larger work, we are eager to share two frameworks, two methodologies and two tools that you will be able to immediately apply with your clients and their families.

Wake up Karen: How to Best Address Conscious and Unconscious Biases

Whether it’s “Karen,” “Cuck,” “Millennial” or “OK Boomer,” stereotypes influence interactions and trust. Knowing how to respond and navigate situations when these and other memes, stereotypes and categories are aimed at you or others is important in successfully working with multigenerational families. During this session we will provide evocative, true stories to catalyze a conversation and workshop focused on effective approaches to both internal and external biases we encounter every day. Participants will be empowered with greater self-awareness and relevant techniques for generating positive connection and mutual understanding, no matter what differences may kick off a conversation.

Are the Stories That Help Us Thrive Being Overlooked?
Ella Chase, Co-Founder of Wellth Works, Michelle Langdon, Co-Founder of Wellth Works & Veronica Yepez, JD, MBA, TEP, CEO of Perpetum Family Office

All of the “Great Tales” of history and many family legacies are written from a male perspective, and yet we know that as Jay Hughes remarks, ‘Family is determined by the women, the mothers, they are the heart of the family and guarantee its survival’. However as Emily Lesser (Author, Cassandra Speaks) keenly points out, the “Great Tales” of history are written from a male perspective. If women held the power to tell stories about family wealth and legacy, what would be different about our work and the way our clients frame and live their values, culture, and families when it comes to wealth and legacy? This session will guide participants through an interactive experience exploring our work as advisors and our interaction with an often untold side of the family’s history, offering each the opportunity to help clients re-write their family history from a new perspective. What would be different?

Stories that value caretaking, champion compassion, unity, and elevate communication over vengeance and competition, may emerge. Walk away with new perspectives to apply to turbulent times.
**The Family Factor—Measuring and Strengthening the Family Bond**

Doug Baumoel, MBA, Founding Partner, Continuity Family Business Consulting, Author & Speaker

In our book *Deconstructing Conflict*, we present the Family Factor—the “glue” that describes a family’s cohesion and resilience. Family Factor answers the question: Is the family bond strong enough to leverage compromise, forgiveness, and commitment to change? This concept has sparked much interest from advisors and families, who want to know how to grow Family Factor—what actions to take. This discussion will be a deep dive into the Family Factor, including how to measure and build it, and how to integrate Family Factor work into your engagements with families, beyond its application for working with conflict.

**Developmental Possibilities in the Aging Process**

Chris Wahl, MA.Ed, President at Christine M. Wahl Consulting LLC

Viewed through the lens of Adult Development theory, this session explores how your mindset towards aging influences your relationships with clients, friends, loved ones and even oneself. As we all inevitably age, we can discover new possibilities worth celebrating in one’s third chapter of life. With the most current aging research available, we’ll use small group discussions to foster generative possibilities that challenge cultural cultural norms and provide new ways of going forward, as well as giving forward, both personally and professionally. Participants will leave with the potential of embracing aging in a new way.

**Pandemic and Purpose: Best Practices in Youth and Teen Philanthropy**

Sue Schwartzman, MA.Ed, Principal at Schwartzman Advising, Simon Shachter, PhD Candidate at Chicago University & Rachel Levenson, Senior Project Leader at Open Capital Advisors

There has never been a more important time to empower the rising generation and let them inform and lead. How can your organization or practice start or enhance a next gen giving program? What might this look like? Why is it important? What are best practices? There is nothing more valuable you can do for your clients then engage their kids in giving back. In this session, you will meet and have a chance to talk to young professionals who were involved in teen philanthropy. Hear how it has made a difference in their lives and learn first-hand what made their experiences valuable. You will also have a chance to “ask an expert” about ways to initiate a program in your organization.

**What’s Love Got To Do With It? Love and the Art of Purposeful Planning**

Marlis Jansen, MA, FBS, Founder of Graddha LLC & Lindsay Fletcher Hardie, PhD, Legacy Coach and Clinical Psychologist, Sierra Legacy Consulting LLC

At PPI, we encourage families to articulate their true legacies and mentor their rising generations so that their most important values and stories are what guide them. With this approach, governance structures emerge that support thriving family cultures even during challenging times. Families often face dynamics and situations that, if treated with love, can ensure long term family cohesion. What is appropriate “professional love?” Resilience comes from resolving challenges in a loving, supportive environment. If this dynamic is practiced early in life, it replicates itself in adulthood, both personally professionally.

In this interactive session, Marlis Jansen and Lindsay Hardie present current research that links love with resilience, then explore the concept of love in professional roles. Love is much more than a second hand emotion or a sweet old fashioned notion - it is critical for optimal client relationships and outcomes.