



 Purposeful Planning Institute
1st Annual
Purposeful Planning Symposium
February 9th-11th, 2022

The Purposeful Planning Symposium is a new and reimagined event for estate planning attorneys, financial planners and advisors, and other professionals and consultants who want to help clients create more meaningful, more positive, and more sustainable plans.

The Purposeful Planning Symposium will bring together nationally renowned faculty for unique and engaging educational and professional development opportunities that will showcase the benefits of infusing best practices from the domains of relational, philanthropic, and legacy planning into the technical aspects of Estate Planning and Wealth Management.

The 1st Annual Purposeful Planning Symposium will provide you with practical guidance, tips, and substantive materials to elevate the estate, transition, and charitable planning conversations. All sessions will be delivered through an interactive virtual format that can be enjoyed in the comfort and safety of your home or office, while providing opportunities to connect and engage with professionals from across the country and around the world.

Topics Include:

- Purposeful Planning
- Planning for More Positive and Sustainable Outcomes
- Cutting Edge Legal & Tax Topics
- Legacy Planning

Registration Details

Member Rate: \$200

Non-Member Rate: \$625 (includes one year PPI membership (\$600 value))

Not a member yet? Your registration will include a one-year membership at no additional cost (valued at \$600). For a complete listing of membership benefits please visit our website. This offer is for first-time members only.

Continuing Professional Education

This program is pending accreditation for 6 hours of continuing professional education credits through the CFP® Board (live participation only) and 9 CLE credits (included one ethics credit) through the Colorado Supreme Court Office of Continuing Legal and Judicial Education (live and/or recorded programming).

Purposeful Planning Institute
4600 S. Syracuse, 9th Floor, Denver, Colorado 80237

Live Virtual Purposeful Planning Symposium

**All times listed in mountain time*

Wednesday, February 9th		
9:30 AM	10:30 AM	Where Purpose Meets Planning <i>David R. York, Esq., CPA</i>
Breakout Sessions		
10:45 AM	11:45 AM	Breaking Through the Implementation Impasse <i>Susan Bradley, CFP®, CeFT®</i>
10:45 AM	11:45 AM	Bene-volence as Good-Willing: The New “Goal” Standard for Estate Planning <i>Raymond C. Odom, Esq., CFP®</i>
11:45 AM	12:15 PM	Facilitated Chat Room Discussions

Thursday, February 10th		
9:30 AM	10:30 AM	Well-Being as an Integrative Approach to Family & Wealth <i>Richard S. Franklin, Esq. & Claudia E. Tordini</i>
Breakout Sessions		
10:45 AM	11:45 AM	Passing the Baton in a Generational Relay Race <i>Mark C. Hartnett, JD, MBA, CFP®, AEP®</i>
10:45 AM	11:45 AM	2021 Hindsight: A Review of Important or Interesting Developments in Estate Planning <i>L. Paul Hood, Jr., JD</i>
11:45 AM	12:15 PM	Facilitated Chat Room Discussions

Friday, February 11th		
9:30 AM	10:30 AM	The Family Advisor’s Role in 2022 <i>Timothy J. Belber, JD, AEP®</i>
Breakout Sessions		
10:45 AM	11:45 AM	Family Strong - Creating A Legacy that Matters with the Seven Gifts <i>Michelle Adams, Esq.</i>
10:45 AM	11:45 AM	Planning for Family Business Assets <i>Rebecca Schroer, Esq.</i>
11:45 AM	12:15 PM	Facilitated Chat Room Discussions

2022 Keynote Sessions



Where Purpose Meets Planning

**David R. York, Esq., CPA,
Managing Partner, York
Howell & Guymon**

This session reviews "the why" of purposeful planning and examines specific strategies used to employ those purposes.

Specifically, the session will review purpose trusts, providing business opportunities for next generation, incorporating charitable strategies including a review of the Newman's Only Exception, and will also review governance options including family offices and private trust companies.



The Family Advisor's Role in 2022

**Timothy J. Belber, JD,
AEP®, Founder &
Principal, The Alchemia
Group LLC**

In 2022 advisors will continue to deal with pandemic related issues, the rise of automation and an uncertain future. Along with these, 2022 and beyond also offers tremendous opportunities for advisors willing to think differently about their role, relationship and responsibility to clients. This session will present six straightforward ideas advisors can implement in their practices to give them the best chance to thrive in 2022.



Well-Being as an Integrative Approach to Family & Wealth

**Richard S. Franklin, Esq., Franklin Karibjanian &
Law PLLC**

Claudia E. Tordini, Principal, Appanage LLC

This keynote presentation will provide a broader lens on family wealth that brings a new perspective for families to envision their future and guide their intentionality. Richard and Claudia will guide participants through an exercise of planning family wealth and inheritance centered around well-being and flourishing.

2022 Concurrent Sessions



Breaking Through The Implementation Impasse

**Susan Bradley, CFP®,
CeFT®, Founder, Sudden
Money Institute**

Here's one of the hardest parts of being an advisor:

Working with clients who do not follow through with intended plans. When this happens, no one is well served -- not the professional and certainly not the client. Important decisions and actions are put off. Opportunities are lost. The advising process gets stuck.

Have you wondered why:

- Why don't they sign the documents?
- Why don't they just follow the advice they've paid for?
- Why don't they return my calls?
- Why do they shut down?
- Why don't they come back?

These questions, equally common to attorneys, financial advisors, and CPAs, are the result of an Implementation Impasse. They indicate the client is not ready to act, but why? More importantly, what can be done? This breakout session will help answer the questions that will get advisors through the Implementation Impasse and overcome the problems that get in the way of effective planning and wealth management. We help advisors overcome the problems that get in the way of effective planning and wealth management.



Bene-volence as Good- Willing: The New “Goal” Standard for Estate Planning

**Raymond C. Odom, Esq.,
CFP®, Senior Vice President,
Northern Trust**

If a client spent \$50,000 on a car, they would have to drive

it to enjoy it. If a client spent \$50,000 on a painting, they would have to display it to enjoy it. If a client spent \$50,000 on estate planning, they would have to ___ enjoy it. Die? The point is that death is not a relevant goal or an appropriate purpose for transfer wealth. And, since saving taxes is not the goal of estate planning, what is the real goal? The answer is “Bene-volence” or good-willing!

This presentation resets the context for all gratuitous transfers by closely examining the derivations and connotations of the word “beneficiary”. Focus on this word that describes all recipients of gifts, will open the door to understanding the entire process, purpose, and effectiveness of all gifting. Careful unpacking of bene-volence will forever change estate and wealth transfer planning into “defined bene-fit [“good” fitted] planning”. This will, once and for all, put family gifts and charitable gifts on identical terms. Best of all this presentation will allow advisors and attorneys to discuss and measure the temporal “happiness”, pleasure and well-being of individuals in a P.E.R.M.A.[®]-nent way.



Passing the Baton in a Generational Relay Race

Mark C. Hartnett, JD, MBA, CFP®, AEP®, Managing Director, Argent Family Wealth Services

The 70/80/90 Principle states 70% of all wealth transfer fail, 80% of trust

beneficiaries consider their trust a burden and 90% of financial assets that survive the second generation will be held in trust. This course will introduce the concept of Smart & Heart Families and how families succeed in the long run despite the 70/80/90 Principle.



2021 Hindsight: A Review of Important or Interesting Developments in Estate Planning

L. Paul Hood, Jr., JD, Consultant/Speaker/Author, Paul Hood Services

Join Paul Hood for a pithy

look back at important 2021 developments in estate planning done in his unique, expert, and irreverent style. The developments Paul will cover will include both tax and non-tax, with an overview of any major changes in federal transfer tax laws should those changes emerge before the Symposium.



Family Strong - Creating A Legacy that Matters with the Seven Gifts

Michelle Adams, Esq., Attorney, Law Office of Michelle Adams, LLC

What does the word “Legacy” mean to you?

Often mistaken for money, influence, or status it’s really about both the tangible and intangible gifts that can be shared. But most importantly, the understanding that every family has the power and responsibility to create an enduring legacy for future generations. In an ever-changing world, it is more important than ever for us to be intentional about the foundation upon which we are building our families. Family Strong – 7 Gifts for A Lasting Legacy is a reminder that it is never too late to strengthen and transform family bonds. The legacy you create is one of the best gifts you can give.



Planning for Family Business Assets

Rebecca Schroer, Esq., Partner, Holland & Hart LLP

This session will explore how to address governance, conflicts of interest, the obligation to inform beneficiaries, duty to diversify and duty to monitor

when drafting trusts that may hold closely held family business assets.