The Fundamentals of Human Connection

Uncovering Common Ground Together

July 18-21, 2022
The 10th annual in-person gathering for PPI members and guests will take place at the Four Seasons Downtown Denver.

Register by April 18th for the best rates and to take advantage of our no-risk cancellation.

Rendezvous is the premier and most professionally diverse gathering of its kind. The 2022 Rendezvous will bring 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. Rendezvous is known for its unique atmosphere and one-of-a-kind learning and networking opportunities.

WHO SHOULD ATTEND?

PPI members who are ready to gather in person to enjoy our exceptional programming and the opportunity to reconnect and engage in person with colleagues from across related professions and across the country. Be sure to register early to secure your spot as capacity will be limited to ensure the comfort and safety of our guests.

TOPICS INCLUDE:

- Family Dynamics
- Family Governance & Leadership
- Philanthropy, Stewardship & Legacy
- Professional Collaboration
- Personal Development & Growth
PLANNING EXPEDITIONS

The quality of 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

**Sandi Bragar**, CFP®, Chief Client Officer, Partner, 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

**Marlis Jansen**, MS, LMFT, Founder & CEO of Graddha LLC

WISDOM EXPEDITION

**Doug Baumoel**, MBA, Partner, Continuity Family Business Consulting

**Michael Blacksburg**, JD, Estate and Legacy Advisor, Blacksburg Law

**Nathan Dungan**, Founder and President of Share Save Spend

**Stephanie Ellis-Smith**, CAP, Founder & Principal, Phila Engaged Giving

**Amanda Koplin**, CEO of Koplin Consulting

**Steve Legler**, MBA, CFA, FEA, Family Legacy Advisor, TSI Heritage

**Shilpa Mirchandani**, Senior Wealth Planner, Senior Vice President at City National Bank

**Melissa Mitchell-Blitch**, Founder of Eredit Consulting, Author & PPI Dean of Individual Development

EXPERIENCE EXPEDITION

**Tierney Aldridge**, Advisor, Denver Agency

**Kaley Fennell**, Coach & Program Coordinator, Legacy Capitals, LLC

**Marlis Jansen**, MS, LMFT, Founder & CEO of Graddha LLC

**Scott Mathewson**, CFP®, Founder, Elevare LLC

**Michele Mikeska**, Clinical Psychologist/Researcher, The Wright Institute

**Jeff Savlov**, Founder, Blum & Savlov, LLP - Family Business & Wealth Consulting
### Monday, July 18th

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Event Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00pm</td>
<td>5:00pm</td>
<td>Pre-Rendezvous Workshops</td>
</tr>
<tr>
<td>5:00pm</td>
<td>7:00pm</td>
<td>Registration &amp; Reception</td>
</tr>
</tbody>
</table>

### Tuesday, July 19th

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Event Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:30am</td>
<td>8:00am</td>
<td>Registration</td>
</tr>
<tr>
<td>7:00am</td>
<td>7:50am</td>
<td>Breakfast &amp; Optional Roundtable Discussions</td>
</tr>
<tr>
<td>8:00am</td>
<td>8:30am</td>
<td>Welcome &amp; Opening Remarks</td>
</tr>
<tr>
<td>8:30am</td>
<td>10:15am</td>
<td>Engaging Beyond Common Ground, akasha, PhD, PCC</td>
</tr>
<tr>
<td>10:15am</td>
<td>11:00am</td>
<td>Break</td>
</tr>
<tr>
<td>11:00am</td>
<td>12:15am</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Family Philanthropy: Connecting Families, Creating Leaders and Having Fun,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Michael Palumbos, CBEC, ChFC, Ryan Ponsford, MBA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>What Psychological Science Can Teach Us About Navigating Difficult</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Conversations, Amy Szostak, Stan Treger, PhD</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Wealth 3.0: Redefining Our Work for a New Generation, Jim Grubman, PhD,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dennis Jaffe, PhD, Kristin Keffeler, MSM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A Coaching Primer for Consultants - Access Your Clients’ Genius, Michael</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Blacksburg, JD, &amp; Natalie McVeigh</td>
</tr>
<tr>
<td>12:15pm</td>
<td>1:30pm</td>
<td>Lunch &amp; Optional Roundtable Discussions</td>
</tr>
<tr>
<td>1:30pm</td>
<td>3:00pm</td>
<td>Realizing Your Dreams Through Community, Amanda Koplin, LPC, Marlis</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Jansen, MA, FBS &amp; Cathy Carroll, MBA, PCC</td>
</tr>
<tr>
<td>3:00pm</td>
<td>3:45pm</td>
<td>Break</td>
</tr>
<tr>
<td>3:45pm</td>
<td>5:00pm</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tools for Nurturing Family Connections in Philanthropy, Janell Johnson CSPG,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CAP, &amp; Stephanie Ellis-Smith, CAP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Power of the Founder’s Journey During Late Adulthood, Mary K. Duke,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>JD, TEP, CMA, &amp; Veronica Yepez Reyna, JD, MBA, TEP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Room Where it Happened - Learning With and From Each Other, Nathan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dungan &amp; Jeff Strese</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Four Requirements of Healthy Relationships: A Family Therapist’s</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Perspective on Strong Family Units, Jocelyn Baker &amp; Kristin MacDermott,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>LMFT</td>
</tr>
<tr>
<td>6:30pm</td>
<td>8:00pm</td>
<td>Dutch Treat Dinner Groups (Optional)</td>
</tr>
<tr>
<td>8:00pm</td>
<td>10:00pm</td>
<td>Jam Session (Optional / Drop-In)</td>
</tr>
</tbody>
</table>
## Wednesday, July 20th

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Event Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:30am</td>
<td>8:00am</td>
<td>Registration</td>
</tr>
<tr>
<td>7:00am</td>
<td>7:50am</td>
<td>Breakfast &amp; Optional Roundtable Discussions</td>
</tr>
<tr>
<td>8:00am</td>
<td>9:30am</td>
<td>FRED Talks (Frank, Relevant, Educational and Dynamic)</td>
</tr>
<tr>
<td>9:30am</td>
<td>10:15am</td>
<td>Break</td>
</tr>
<tr>
<td>10:15am</td>
<td>11:30am</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transforming Relationships by Listening to See, akasha, PhD, PCC</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Engaging Women: Bucking Traditional Gender Roles in Family Wealth, Tierney Aldridge &amp; Sandi Bragar, CFP®</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Experiential Connection: An Idea-Sharing Breakout, Kaley Fennell, Kristen Heaney, MSW, BCC, CFWA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Insight, Intuition, and Connectedness: Deepening Your Client Relationships Through Presence, Lindsay Hardie, PhD, &amp; Michele Mikeska, PsyD</td>
</tr>
<tr>
<td>11:30am</td>
<td>11:45am</td>
<td>Break</td>
</tr>
<tr>
<td>11:45am</td>
<td>1:00pm</td>
<td>Lunch &amp; Optional Roundtable Discussions</td>
</tr>
<tr>
<td>1:00pm</td>
<td>2:15pm</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>1:00pm</td>
<td>2:15pm</td>
<td>5 Practices to Activate the How of Learning, Stacy Allred, MST, CPA, CFP®, CEPA, Cathy Carroll, MBA, PCC</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Understanding Your Wealth Integration Journey as You Connect with Your Client's Journey, Courtney Pullen MA, LPC</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Quest for Legitimacy: How Children of Prominent Families Discover Their Unique Place in The World, Jamie Weiner, PsyD, Russ Haworth, ACFBA, Veronica Yepez Reyna, JD, MBA, TEP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Three Inheritance Styles: How Can the Right Fit Empower the Rising Generation?, Robin Catlin, MBA, CFP®, Matthew Wesley, JD, M.Div</td>
</tr>
<tr>
<td>2:15pm</td>
<td>3:00pm</td>
<td>Break</td>
</tr>
<tr>
<td>3:00pm</td>
<td>5:00pm</td>
<td>Rendez-Community (Variety of Social &amp; Network Events)</td>
</tr>
<tr>
<td>6:30pm</td>
<td>8:00pm</td>
<td>Gala Dinner</td>
</tr>
<tr>
<td>8:00pm</td>
<td>10:00pm</td>
<td>Jam Session (Optional / Drop-In)</td>
</tr>
<tr>
<td>Start Time</td>
<td>End Time</td>
<td>Event Name</td>
</tr>
<tr>
<td>------------</td>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td>8:00am</td>
<td>8:45am</td>
<td>Purposeful Connections</td>
</tr>
<tr>
<td>8:45am</td>
<td>9:15am</td>
<td>Break</td>
</tr>
<tr>
<td>9:15am</td>
<td>10:30am</td>
<td>Panel: The Mystery and Magic of the Advisor / Client Connection, Moderated by Kristen Heaney, MSW, BCC, CFWA</td>
</tr>
<tr>
<td>10:30am</td>
<td>11:00am</td>
<td>Break</td>
</tr>
<tr>
<td>11:00am</td>
<td>Noon</td>
<td>The Gift of Lift: Harnessing the Power of Purpose to Elevate the World, David R. York, Esq., CPA</td>
</tr>
<tr>
<td>12:00pm</td>
<td>1:00pm</td>
<td>Lunch &amp; Optional Roundtable Discussions</td>
</tr>
<tr>
<td>1:30pm</td>
<td>4:00pm</td>
<td>Denver Botanic Gardens with Marlis Jansen, MS, LMFT</td>
</tr>
</tbody>
</table>
Engaging Beyond Common Ground

akasha, PhD, PCC
Coach, Facilitator, and Gardener of Belonging
Cultivating Leadership + The Meadow

Fostering deep human connections is essential to thriving in our increasingly complex, diverse, and uncertain world. This means finding common ground and realizing that we are in this life together. We deepen connection on the way to finding common ground. We find common ground by celebrating our similarities. This is important. And our survival and evolution demand that we engage beyond our similarities. One of the fundamentals of deep human connection is having the capacity to see and embrace each other’s differences. This is not easy. Our brains are wired to see differences as threats and things to manage or dominate. Plus, the ways we see the world and others is deeply rooted in the person we hold ourselves to be. So, how do we find common ground and engage beyond it? We must learn different ways of seeing, shift how we know, and unlock the identity of who we want to be next.

This is the journey we’ll go on together on July 19.

The Gift of Lift: Harnessing the Power of Purpose to Elevate the World

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

We live in a world that tells us how to live, what matters (and what doesn’t), and how to get what it says we want. These impersonal, external forces push us around and leave us off-balance, confused, and fatigued. Like actors following a script we didn’t write, we find ourselves uncertain of where we have ended up, much less where we want to go, and asking ourselves, “What am I supposed to do next?” This can be especially acute among the higher net worth, who struggle to bring meaning and purpose to the wealth they have accumulated. Among us, however, are those who live differently. Held steady by the pull of purpose that comes from the gravitational force of something far bigger than themselves, they amplify that draw with their own deep personal engagement. These women and men live in an upward flow of clarity, vision and balance that guides their lives and their wealth, allowing them to make lasting impacts in the World. More than mere consumers, dreamers or even owners, these people have found the secret to a life lived as... a Steward. This presentation reviews commons myths about money and wealth that too often undermine effective wealth transfer. After exposing these myths, the presentation then outlines the mindset, characteristics, and traits of Stewards and how they think and act in fundamentally different ways and it ends with practical ways to create a Steward mentality for yourself, your family, and the organizations of which you are a part.
Beyond the Estate Plan – Be A Better Ancestor
Donal Griffin | Solicitor, like an Attorney!, Legacy Law
Donal Griffin is a lawyer and family governance specialist who loves to work with families. He trained as a lawyer in Ireland but has been practising with families for 20 years in Sydney, Australia. Donal will share his thoughts on the following topics:

• Leaving a legacy beyond legal documents
• How to be a better ancestor
• Build one of the Great Families
• Donal has written a memoir, “An Irish Book of Living and Dying – a Migrant’s tale” and is finishing a book the provisional title, “Be A Better Ancestor”

Art, The Missing Link in Human Connection
Claudia Tordini, MBA, MPhil | Principal, Appanage LLC
Art has been an enabler of human connection since the beginning of humanity. Whether it is with self, others or the environment, art facilitates true bonding for it activates the positivity and creativity of human life. This talk is aiming to bring a new awareness of the power of experiencing art, in particular, as a shortcut to human connection.

Deepening Client Connection through Storytelling
Amanda Weitman, MBA | Wealth Advisor, Wells Fargo
Storytelling helps us build trust, introduce new perspectives, connect family members, share wisdom through successes and failures, and share values. We all love sharing stories and listening to stories. We all have these stories but are we ready to share them and do we know which stories to share to create the greatest impact? And can we learn to draw out these stories from our clients to help strengthen their families and impact?

Healing Through Listening: A Revolutionary Approach to Address JEDI (Justice, Equity, Diversity and Inclusion)
Arielle Nóbile | Legacy Filmmaker, Legacy Connections Films
Experience a new listening practice that can help PPI and its members lead the way to a more loving, just, and equitable world. By shifting the way that you listen, you can “be the change” that Ghandi and other loving leaders encouraged. In this talk learn ways that PPI and its members can use your networks, resources, and power to bridge racial wealth disparities and build more generational wealth for all. If you have no idea what JEDI is, this talk will also address this.

Balance of Power: Working with Family Cultures
Matthew Wesley, JD, MDiv | Managing Director, Merrill Center for Family Wealth™, PPI Dean of Family Culture
Every family has its own power dynamics which influence how the family moves forward and responds to professional advice. Understanding how power works in families is a topic we often don’t address and yet it is critical to our work with family systems. Here we will look at the three types of power, the difference between technical and adaptive challenges, and the development of gamechanging as an approach to help advisors gain greater credibility and facilitate transformative change.
MAIN STAGE SPEAKERS
PLENARY & PANEL SESSIONS

Realizing Your Dreams Through Community

Amanda Koplin, LPC | CEO, Koplin Consulting
Marlis Jansen, MS, LMFT | Founder & CEO, Graddha LLC
Cathy Carroll, MBA, PCC | President, Legacy Onward, Inc.

“It all started at PPI!” So many of us have stories that start with this statement. PPI is a unique community of committed professionals who support and challenge our clients, and each other, to define and manifest a vision. Let’s take it up a notch. Let’s explore ways to more intentionally and consciously articulate our dreams. Let’s invite each other to step up, lean in, and bring these dreams to fruition. Together, we comprise a staggering level of collaborative potential. When named and tapped, this potential will deepen our connection to each other and those we serve. Roll up your sleeves and have some fun in an interactive session that may change the course of your life, personally and professionally.

Purposeful Connections

Natalie Wagner Willis, CFRC | Finologist, The What is Finology? Project & VitalFinancials
Cindy Radu, LLB, LLM, TEP, ICD.D | Family Wealth Transition Advisor, Cindy Radu Advisory Ltd.

During this brief main stage presentation, we will hear from two colleagues whose purposeful connections have made a significant impact on them and their work.

Panel: The Mystery and Magic of the Advisor / Client Connection

Scott Peppet | President, Chai Trust Company
Padric H.B. Scott, CFP®, ChFC®, CLU®, WMCP® | Founding Partner, CrossRoad Wealth Management Group
Nike Anani | Family Office Advisor, Nike Anani Practice

What does it take to establish and maintain the kind of connection with your clients that leads to a meaningful and productive engagement? What is it like to be on the receiving end of the work of the purposeful advisor? This panel discussion will feature a conversation with several individuals who can offer insights from both sides of the table - sometimes as the advisor, and sometimes as a client amongst their own successful families. Participants will walk away with fresh perspectives on how to build effective connections with clients.
Family Philanthropy: Connecting Families, Creating Leaders and Having Fun

Michael Palumbos, CBEC, ChFC | *Family Wealth Advisor, Family Wealth and Legacy*
Ryan Ponsford, MBA | *Co-Founder, Gateway for Good*

During this interactive workshop participants will work together in small groups to create several ideas for grandparents to work with their grandchildren at different age brackets. The anticipated outcome will be a resource to share with clients that will provide many ideas for grandparents to utilize with their grandchildren to help guide them through the family philanthropy project.

Each of the ideas presented should be designed to help the grandchildren develop leadership, communication, critical thinking or leadership skills. All while having fun and connecting the family.


What Psychological Science Can Teach Us About Navigating Difficult Conversations

Stan Treger, PhD | *Behavioral Insights Advisor, Northern Trust*
Amy Szostak | *Director, Family Education & Governance, Northern Trust*

Conversations are some of the most enjoyable human experiences, residing at the core of interpersonal connectedness. Yet, as advisors, we know that familial conversations about money are challenging. In this session, we summarize psychological theory and research on self-disclosure, deriving empirical insights to help with talking about difficult topics. We share research showing that strategies such as gradually building topical intimacy and reciprocity in conversation roles promotes rapport and contributes to more productive conversations (e.g., Sprecher & Treger, 2015). Advisors will engage in interactive exercises they can leverage to successfully facilitate difficult conversations with and among their clients.
### Three Inheritance Styles: How Can the Right Fit Empower the Rising Generation?

**Robin Catlin, MBA, CFP® | Managing Director, Merrill Center for Family Wealth™**  
**Matthew Wesley, JD, MDiv | Managing Director, Merrill Center for Family Wealth™**

The rising generation often struggles to develop a healthy relationship with wealth. If the challenges of the rising generation as inheritors are not addressed, failure to integrate wealth into their lives can have devastating consequences on the inheritor’s sense of self and personal development, and the family’s long term trajectory, with implications for many generations to come. We will share a powerful model for understanding the styles of inheritance, their healthy and unhealthy forms and the challenges and possibilities of each type. In this interactive session, participants will gain practical tools to help families assess and meaningfully address the realities of inheritance in the lives of beneficiaries.

### Tools for Nurturing Family Connections in Philanthropy

**Janell Johnson, CSPG, CAP | Senior Philanthropic Advisor, Phila Engaged Giving**  
**Stephanie Ellis-Smith, CAP | Founder and Principal, Phila Engaged Giving**

Family dynamics reveal the patterns of connectivity between family members rooted in tradition, culture, and identity. Join us for an honest and robust discussion about how we as advisors can create a supportive environment that nurtures bold ideas and innovations that lead to deeper connections among family and with their philanthropy. We will share how we deployed various resources that built trust and a shared sense of purpose within a 5th generation UHNW family that was grappling with a complex family legacy and how they could redefine it using a creative philanthropic entity that focused on inclusivity, equity, and repair.

### Wealth 3.0: Redefining Our Work for a New Generation

**Kristin Keffeler, MSM | Principal/Chief Learning Officer, Illumination360/Johnson Financial Group**  
**Dennis Jaffe, PhD | Senior Research Fellow, BanyanGlobal Family Business Advisors**  
**James Grubman, PhD | Owner, Family Wealth Consulting**

Building on the themes of Wealth 3.0 first outlined at Rendezvous in 2019, this workshop will go into specifics about the implicit negative biases of Wealth 2.0 while remembering the tremendous benefits still valid from that era. We will then shift to detailed discussion of what a positive approach looks like in action for family consultants in their everyday work. Using interactive case discussion, role play, and demonstration of practical tools, we will answer the question of what we all can do differently in moving ahead. We will also engage actively on thorny questions about professionalizing the field and what this may mean for PPI.
A Coaching Primer for Consultants - Access Your Clients' Genius

Michael Blacksburg, JD | *Estate and Legacy Advisor*, Blacksburg Law

Natalie McVeigh | *Director*, EisnerAmper

Trained coaches, Natalie McVeigh and Michael Blacksburg, will introduce you to the coaching modality and its effectiveness in planning engagements. They will facilitate a conversation among several other PPI member-coaches who regularly use the coaching approach. Session participants will walk away understanding the distinction between consulting and coaching, the mechanics of a coaching session, and a hands-on exercise practicing select International Coaching Federation core competencies.

The Four Requirements of Healthy Relationships: A Family Therapist’s Perspective on Strong Family Units

Kristin MacDermott, LMFT | *President*, MacDermott Method, Inc.

Jocelyn Baker | *Owner*, GhostWriters Anonymous

Purpose-driven advisors want to serve their clients in deeper, more meaningful ways, but doing so can mean wading into the realm of interpersonal relationships, which can be fraught with conflict and unspoken tension. It can feel like you need to be a therapist rather than a financial advisor to navigate the elephants and land mines in the room!

Learn the four requirements of healthy relationships from a licensed marriage and family therapist, as well as, how to spot the cans of worms that are best referred out to a mental health professional, and walk away with several tools for deepening family connections.

Engaging Women: Bucking Traditional Gender Roles in Family Wealth

Tierney Aldridge | *Advisor*, Denver Agency

Sandi Bragar, CFP® | *Chief Client Officer, Partner*, Aspiriant

Upon meeting one another at Rendezvous 2019, a collaboration of women leaders was created and we have since met quarterly through a virtual platform. One topic that continues to show itself in our conversations and learnings is the concept of women’s voices being neglected or, more likely, unheard at the family finance table. According to an article by the New York Times, affluent Millennial women are more likely to defer to their male partners on investments - https://www.nytimes.com/2020/10/24/business/millennial-personal-finance.html. We’ve explored through our collaboration the idea that perhaps society and culture still plays a role in women not finding comfort or value in finance. We see this trend from families we represent and in the industry as a whole. The goal of this breakout is to help advisors discuss the value of having women involved in family wealth decisions, while providing tools to help engage the women in the families they represent through case studies and role play.
Understanding Your Wealth Integration Journey as You Connect with Your Client’s Journey

Courtney Pullen MA, LPC | President, Pullen Consulting Group

Participants will explore their relationship with wealth using the money relationship continuum. The goal of the session is for participants to better understand their money scripts and how to have a more empowered relationship with money thus enabling them to support their clients in the same journey.

Experiential Connection: An Idea-Sharing Breakout

Kristen Heaney, MSW, BCC | Coach/Consultant, Legacy Capitals
Kaley Fennell | Coach & Program Coordinator, Legacy Capitals

Getting back to facilitating in-person client meetings can feel a bit like getting back to the gym after a fitness hiatus. Your creative muscles will be burning in this idea-sharing breakout session where participants will be invited to share ideas for experiential or other connection-promoting activities to use in client meetings.

In Round 1, we’ll gather icebreakers and demonstrate a few. Round 2 will target group activities designed with a specific purpose, such as clarifying vision or reinforcing connection. Finally, we’ll present a real-life scenario and ask participants to work in collaborative groups to develop, share and execute a custom experiential activity addressing the identified goals.

The Power of the Founder’s Journey During Late Adulthood

Veronica Yepez Reyna, JD, MBA, TEP | Founder, Perpetum Family Office
Mary Duke, JD, TEP, CMA | Independent Advisor to Families

Founders during their late adulthood often ask our community for help in redefining their role. Their request is often explored through the optic of doing (a new role, project, or hobby). However, such stage is also a unique opportunity for inner work that can bring breakthroughs and transformation. How might we support founders in seeking a larger world view and a new level of self-consciousness during their late adulthood? What might be different in their generational transitions?

This session invites participants to contribute to our exploration of the many perspectives we might tap into in supporting founders during their late adulthood as part of the collective family’s quest to achieve the truest expression of themselves.
The Room Where it Happened - Learning With and From Each Other

Nathan Dungan | President/Founder, Share Save Spend, LLC
Jeff Strese | Principal, Jeff Strese Consulting Services

In our work with UHNW families, there are numerous opportunities to model and coach into the philosophy: learning with and from each other. We will discuss a recent collaboration we had with Mindy Earley, Chief Learning Officer at FOX for their Rising Gen Leadership Program. We will outline the process we developed to leverage our skills so the participants could maximize their interactions with each other as they explored a variety of topical issues. We will provide a framework for PPI participants to do the same explore the philosophy for both personal and professional growth.

The Quest for Legitimacy: How Children of Prominent Families Discover Their Unique Place in The World

Jamie Weiner, PsyD | Wealth Whisperer, Inheriting Wisdom
Russ Haworth, ACFBA | Family Business Adviser, The Family Business Partnership
Veronica Yepez Reyna, JD, MBA, TEP | Founder, Perpetum Family Office

This session is designed to debunk the Affluenza Myth. Aimed at those who are, have been or feel for the Rising Gen who are on their Quest for Legitimacy.

Participants willing to explore, will be walked through the four phases of their own quest.

Redefining breaking moments (life’s struggles) as the doorway on your path toward ownership of your life allows you to enter periods of liminality, feeling betwixt and between, with confidence. Gender, cultural differences, and the challenges present when successful elders haven’t taken their own quest are important. Shifting the paradigm, we illustrate that the quest is a personal journey.

Insight, Intuition, and Connectedness: Deepening Your Client Relationships Through Presence

Lindsay Hardie, PhD | Clinical Psychologist, Sierra Legacy Consulting, LLC
Michele Mikeska, PsyD | Clinical Psychologist/Researcher, The Wright Institute

In the spirit of the theme of this conference, we want to provide an experience of human connection. We plan to facilitate several exercises that will foster deep interpersonal connection and presence in the moment. We will invite participants to examine distinctions between their thoughts and the way thoughts can create separation, versus present moment awareness where deep connection is possible. The session will include a reflective discussion of the exercises. This series of exercises will leave participants with a way of being with clients that will deepen their relationships and provide a transformative service, regardless of their profession.
## 5 Practices to Activate the How of Learning

**Stacy Allred, MST, CPA, CFP®, CEPA | Managing Director, First Republic**  
**Cathy Carroll, MBA, PCC | President, Legacy Onward, Inc.**

This highly interactive workshop explores five practical ideas to elevate the effectiveness of learning including: Groundwork, Less Input, More Output (Learning Science), Match Method to Purpose (Experiential Learning), Surprise and Delight, and Reflect and Unlearn.

## Transforming Relationships by Listening to See

**akash, PhD, PCC | Coach, Facilitator, and Gardener of Belonging, Cultivating Leadership + The Meadow**

This highly interactive session aims at building skills for transforming and evolving our relationships. One of the fundamentals of transforming our relationships is loving across differences, or really seeing one another in our differences. There are likely a number of ways to do that, but one practice that is consistently effective is listening to see. There are a number of ways to listen. We will explore four of those ways and practice two of them in this session. The two we will practice together are also the ones most useful in navigating and thriving in our complex and diverse world.
RENDEZ-COMMUNITY ACTIVITIES
WEDNESDAY, JULY 20TH AT 3:00PM - 5:00PM

Rapid Community Building: Pushing Your Capacities at Facilitating Connection
Matthew Wesley, JD, MDiv

As advisors, we are often called upon to create environments of safety, trust, engagement and depth. We often don’t have much time to do all of that. In this session, we will not talk about how to build community but actually create as much community as possible. In self-facilitated groups of 4-5 people, we will ask each group to develop a sense of community in 30 minutes. The acid test will be to see if you walk away from the group feeling as though you have deeply connected with people in your group on more than just an intellectual level. We will then draw on the group experience to draw principles of rapid cycle community development that all can take back into their work to develop deeper connection with the individuals and groups they work with.

Creating a Personal Values Pyramid and Working with Families on their Values
Dennis T. Jaffe, PhD and Cynthia Scott, PhD

The foundation for an aligned and long-lasting family is shared values. The first step, however, if to recognize each person’s uniqueness by sharing individual values. For more than 30 years we have worked with values, creating the Values Edge, a deck of cards and a model of values. Now, after two decades of work with thousands of global families and work groups, we have thoroughly redesigned the cards and our model. in this workshop each person will receive a set of cards and create their own values pyramid. They will learn about how to define their values styles, in their personal actions and in their relationship to their social and environmental worlds. We will present the model and have a chance to explore values differences in small groups. Then we will end by talking about how to move from individual to shared family, or work team, values.

This workshop is limited to 40 people.

Exploring Belonging: Building Trust and Radical Empathy as We Examine White Privilege
Arielle Nóbile

You are invited to take part in a deep dive into the intersection of empathy, trust and belonging. This session will invite you into a deep personal and community inquiry about the ways white privilege currently functions in our society and how we can personally and collectively reckon with it. We will explore these concepts through a series of creative exercises, games, and deep talk.

Running / Bicycling Groups

Connect with other runners and bicyclists at Rendezvous and enjoy seeing Denver while participating in a run/jog/bike excursion with other attendees! To connect with runners/joggers please contact Doug Baumoel at DBaumoel@ContinuityFBC.com. If you are interested in going on a ride with other cyclists contact Scott Mathewson at smathewson@elevarellc.com. Scott can also connect you with a nearby shop where you can rent a bike, if needed.

Slow Flow Yoga

Slow flow is about mindfulness, movement, and breath with this vinyasa based class. Build strength, balance and flexibility in the body while also exploring a deeper focus in the mind. Leave feeling more balanced and connected. Yoga mats will be provided, and all levels are welcome.

Using the Power of Ancient and Natural Metaphors to Bring Families Round the Same Fire and onto the Same Map
Anthony has lived a life on some of the roads less travelled in many of the remotest parts and hostile parts of the world. Based on these experiences Anthony has developed an inspirational methodology which helps individuals and organizations achieve greater fulfillment and productivity through the use of metaphors which bring everyone round the same fire and onto the same map.
PRE/POST RENDEZVOUS ACTIVITIES

Before the Rendezvous of 2022: Take a Trip to YOU

Monday, July 18th at 1:15pm - 5:00pm

Presented by Stephanie West Allen, JD

With enthusiasm as your fuel, adventurousness as your incitement, and curiosity as your propellant, join Stephanie West Allen, JD (PPI Dean of Neuroscience, Artistry, and Contemplative Practices) as we go on explorations inside ourselves, expeditions outside our routines, and excursions alongside each other.

White Water Rafting & Mt. Evans Tour

Monday, July 18th (early morning through about 6pm)

For those who are looking for a true Colorado experience and some real adventure! Participants will meet early at the Four Seasons and travel to Idaho Springs (45 minutes) to the Colorado Adventure Center for a White Water Rafting trip (beginner & intermediate options available). Followed by lunch (break into small groups – many great options for lunch for all dietary desires) in the small mountain town of Idaho Springs. The group will then drive up Mt. Evans - the highest paved road in North America! Beautiful and scenic drive to the top (alpine lakes, massive granite walls and strands of twisted, ancient bristlecone pine, mountain goats and bighorn sheep prancing around). Then remain at the summit parking lot with amazing views or walk ~100 yards for a bit more of a view!

PPI member Jeff Savlov is organizing this trip based on his mind-blowing experience doing the same itinerary in 2019. For more information, please contact Jeff directly at jsavlov@blumandsavlov.com.

*This is an at-your-own risk activity and is not sponsored or organized by the Purposeful Planning Institute*

Denver Botanic Gardens

Thursday, July 21st at 1:30pm

Marlis Jansen will be coordinating a visit to the Denver Botanic Gardens at York Street, a wide range of gardens and collections on 24 acres. Denver Botanic Gardens York Street is open with limited capacity and timed tickets. Tickets must be purchased in advance and are not available onsite. Please purchase or reserve (if you are a member) your ticket in advance and contact Marlis at marlis@graddha.com for meeting location and transportation.
HOTEL RESERVATIONS
Four Seasons Hotel Downtown Denver

We look forward to hosting Rendezvous at the Four Seasons Hotel in Downtown Denver! We have negotiated a very favorable rate for our attendees ($285 per night; promo code provided upon registration). Join us at one of Denver’s most luxurious hotels at a fraction of the cost compared to standard rates. But act fast…we anticipate our block will fill up quickly. Register now and book your room right away so you don’t miss out on what is sure to be a truly amazing experience!

COVID & SAFETY

We are committed to creating a safe and healthy environment for all our attendees and staff. As excited as we are to reunite with our PPI community, we also recognize that COVID-19 is still a risk. We’ve implemented a no-risk refund policy and protocols to help promote a safe on-site experience.

Specific health and safety measures will be described and disseminated as they become available.

Please note, even with the following safeguards there remains a risk of contracting COVID-19.

CANCELLATION POLICY

You may cancel your registration for a full refund if requested prior to or on June 13th. If there are compelling reasons (such as health or family emergencies) refunds after June 13th may be given less a $100 per registration processing fee.

REGISTRATION DETAILS

Early-Bird Rate Register by April 18 - Member: $1,195 | Non-Member: $1,695
Preferred Rate Register between April 19 and June 13 - Member: $1,345 | Non-Member: $1,845
Standard Rate Register after June 13 - Member: $1,545 | Non-Member: $2,045

Not a member? We've got you covered! Register early and you can add an annual subscription for only $100! (That’s a $500 savings!)

Register at: PurposefulPlanningInstitute.com/rendezvous-2022/

REGISTRATION & RECEPTION

Stop by the registration table on the 2nd floor upon arrival to check-in and pick up your name badge and materials. We will be hosting a Welcome Reception on Monday, July 18th from 5pm – 7pm for those arriving early. If you are arriving on Monday, please plan to stop by the Grand Ballroom Foyer (2nd floor) for refreshments and light hors d’oeuvres.

DUTCH TREAT DINNER GROUPS

We will organize small (usually 4 to 5 people) dinner groups for those who would like to go to a nearby restaurant for a “Dutch Treat” dinner on Tuesday, July 19th. 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 event. Additional information, such as reservation details, will be provided the week of July 11th.

GALA DINNER

The Gala Dinner will take place on Wednesday, July 20th at 6:30pm at the Four Seasons Hotel. Reservations are required for the Gala dinner. There is no additional cost for registered attendees. Suggested attire is smart casual.

JAM SESSIONS

In a long-standing Rendezvous tradition, we will be hosting informal drop-in Jam Sessions on Tuesday, July 19th and Wednesday, July 20th. These will be informal gatherings on the pool deck (weather permitting) starting around 8:00pm. Everyone is welcome to attend and if you are inclined to participate by playing a musical instrument or singing along, we encourage you to bring a tablet or phone to access lyrics (and chords) on http://www.ultimate-guitar.com. We will be providing two acoustic guitars and some hand percussions. Feel free to bring an instrument if you have one!

For more information on these and other activities, or to RSVP for optional activities, please visit the Participant Information page (link provided upon event registration).