Purposeful Planning Institute

11th Annual

Rendezvous

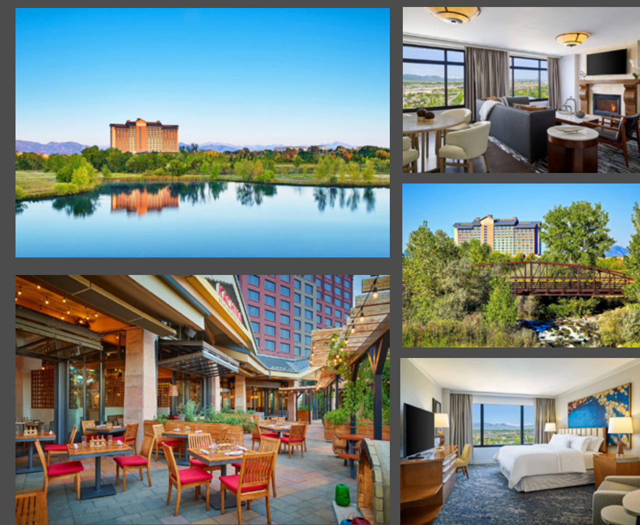
July 31 - August 3, 2023

THE JOY OF CONNECTION

Cultivating Possibilities

The 11th annual in-person gathering for PPI members and guests will take place at the Westin Westminster.

Rendezvous is the premier and most professionally diverse gathering of its kind. The 2023 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 connect 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.

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*

Kristen Heaney, *MSW, BCC, Legacy Consultant, Legacy Capitals, LLC*

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

Matthew Wesley, *JD, MDiv, Principal, The Lovins Group, LLC*

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

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

WISDOM EXPEDITION

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

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

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

Michele Mikeska, *PsyD, Relationship & Wealth Psychologist, Executive Director, FBN-USA*

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

Jane Beddall, *MA, JD Certified Conflict Coach, Mediator, Consultant & Principal, Dovetail Resolutions, LLC*

Niké Anani, *Director, Next Gen Advisory, Northern Trust Corporation*

EXPERIENCE EXPEDITION

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

Shilpa Mirchandani, *Lead Family Dynamics Consultant Wells Fargo*

Amanda Koplin, *CEO of Koplin Consulting*

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

Jeff Savlov, *Founder, Blum & Savlov, LLP, Family Business & Wealth Consulting*

Kaley Hudson, *Coach & Director of Operations, Legacy Capitals, LLC*

Randi Hogan, *CAP®, Founder & President, Hogan Philanthropy Consulting*

Padric Scott, *AEP®, CAP®, CFP®, President & CEO, Crossroad Capital Partners*

Paul Edelman, *PhD, PCC, Advisor to Successful Entrepreneurs, Family Coach & Meeting Facilitator, Edelman and Associates*

Kjartan Jansen, *MA, CFA, Co-Founder & CFO, Graddha, LLC*

Claudia Tordini, *MBA, MPhil, Principal, Appanage, LLC*

AGENDA

Monday, July 31st

Start Time	End Time	Event Name	Speaker(s)
7:00am	6:00pm	Pre-Rendezvous Workshops & Activities (see page 17 for detail)	
9:00am	4:00pm	Accessing Ancient Wisdom for Living in Full-Hearted Prosperity	Anthony Willoughby Don Opatrny, LMFT Doutzen Groothof Polina Crotty, CFP
1:00pm	5:00pm	The Mindset and Spirit of Service: Leveling up Using the Power of Purpose, Delight, and Surprise	Stephanie West Allen, JD
1:00pm	7:00pm	Art Experience Room	
5:30pm	7:30pm	Welcome Reception	

Tuesday, August 1st

Start Time	End Time	Event Name	Speaker(s)
6:30am	5:00pm	Registration	
7:00am	5:00pm	Art Experience Room	
7:00am	8:00am	Breakfast & Optional Roundtable Discussions	
8:00am	8:30am	Welcome & Opening Remarks	
8:30am	10:15am	Strategic Storytelling for Cultivating Connection	Esther Choy
10:15am	11:00am	Break	
11:00am	12:15pm	Breakout Sessions	
		Rethinking How We Advise Versus Educate the Next Gen	Kirby Rosplock, PhD Cindy Radu, LLB, LLM, TEP, ICD.D Judy Pearson
		Wealth 3.0 in Action - Case Method Learning	Jim Grubman, PhD Dennis Jaffe, PhD Kristin Keffeler, MSM
		Insight, Intuition, and Connectedness: Deepening Your Client Relationships Through Presence	Lindsay Hardie, PhD Michele Mikeska Jaffe, PsyD
		Idea Lab: Mapping the Future of Philanthropic Advising	Dien Yuen, JD/LLM, CAP®, AEP® Alisia Robin, MA
12:15pm	1:30pm	Lunch & Optional Roundtable Discussions	

AGENDA

Tuesday, August 1st (Continued)

Start Time	End Time	Event Name	Speaker(s)
1:30pm	3:00pm	FRED Talks (Frank, Relevant, Educational and Dynamic)	
3:00pm	3:45pm	Break	
3:45pm	5:00pm	Breakout Sessions	
		Where the Money Magic Happens	Nancy Sharp Sandi Bragar, CFP
		Starting on the Road to JEDI Investing Mastery	Erika Seth Davies Tony Macklin, CAP®
		Opening New Possibilities for Wealthy Couples	Donald Opatrny, LMFT Ruth Steverlynck, LLB, FEA
		Advancing Flourishing: The 10 x 10 Learning Roadmap	Stephen Goldbart, PhD Joan DiFuria, MFT Stacy Allred, MST, CPA, CFP, CEPA
6:30pm	8:00pm	Dutch Treat Dinner Groups (Optional)	
8:00pm	10:00pm	Open Mic & Sing-Along (Optional / Drop-In)	

Wednesday, August 2nd

Start Time	End Time	Event Name	Speaker(s)
6:30am	5:00pm	Registration	
7:00am	5:00pm	Art Experience Room	
7:00am	7:50am	Breakfast & Optional Roundtable Discussions	
8:00am	9:30am	Purposeful Conversations	Sandi Bragar, CFP® Steve Legler, MBA, CFA, FEA
9:30am	10:15am	Break	
10:15am	11:30am	Breakout Sessions	
		NOT a Freudian Slip: Vulnerability and Authenticity: Keys to Being an Effective Planning Professional	L. Paul Hood, Jr., JD Julie Johnson, MBA, LMFT
		Challenge Carousel: Cultivating Solutions to the Top Rising Gen Challenges	Mindy Kalinowski Earley, CMP, CFBA Allison Lawshe
		Systemic Enneagram: A Tool for Evolution of the Family System Through Integration and Connection	Veronica Yepez Reyna, JD, MBA, TEP Mary Duke, JD, TEP, CMA
		Asian American Perspectives - Cross Cultural and Intergenerational Dynamics	Shilpa Mirchandani Elizabeth Nam

AGENDA

11:30am	1:00pm	Lunch & Optional Roundtable Discussions	
1:00pm	2:15pm	Breakout Sessions	
		Cultivating Positive Interactions in Families: A Research-Based Tool for Creating a Healthy Sense of Belonging	Kristin MacDermott, LMFT Jocelyn Baker
		Bridging the Divide Between Generations Through Rites of Passage	Jamie Weiner, ClinPsyD Russ Haworth, ACFBA Kim Schneider Malek
		Can Advisory Relationships Provide Purposeful Connection?	Lindsay Pope Evana Lithgow
		What Do You Do in the Cauldron of Conflict?	Valerie Galinskaya, MBA Matthew Wesley, JD, M.Div
2:15pm	3:00pm	Break	
3:00pm	5:00pm	Rendez-Community (Variety of Educational and Somatic Events)	
6:30pm	8:00pm	Gala Dinner	
8:00pm	10:00pm	Open Mic & Sing-Along (Optional / Drop-In)	

Thursday, August 3rd

6:30am	5:00pm	Registration	
7:00am	7:50am	Breakfast & Optional Roundtable Discussions	
8:00am	9:30am	Plugging Into a Truly Renewable Energy Source — The Joy of Connection	Kanwar Singh, CDFA® Gayle Colman, CFP® Donald Opatrny, LMFT
9:30am	9:45am	Break	
9:45am	10:30am	Telling Our Stories	Paul Edelman, PhD, PCC Kaley Hudson
10:30am	11:00am	Break	
11:00am	Noon	The Experience of Connection - The Joys of Listening	Padric H.B. Scott, CFP®, ChFC®, CLU®, WMCP®
12:00pm	*1:00pm*	Lunch & Optional Roundtable Discussions	
1:30pm	*4:00pm*	*Post-Rendezvous Activities*	

MAIN STAGE SESSIONS

Strategic Storytelling for Cultivating Connection

Esther Choy, ***CEO and Chief Story Facilitator,*** *Leadership Story Lab*

Our desire to connect with each other is universal, even with those we seemingly have nothing in common. Learn how to create an authentic connection across disciplines and life experiences that ultimately evokes emotion and encourages collaboration.

Through customized interactive exercises for professionals serving families of wealth, participants will apply key elements of storytelling, uncover their audience's point of view and craft an engaging story.

Join us for this powerful bonding experience that focuses on weaving purpose and meaning into your story.

Telling Our Stories

Kaley Hudson, ***Coach & Director of Operations,*** *Legacy Capitals, LLC*

Paul Edelman, ***PhD, PCC, Advisor to Successful Entrepreneurs, Family Coach & Meeting Facilitator,*** *Edelman and Associates*

At PPI, our members are the community's greatest strength and resource. This session is an opportunity to reflect on your connections within the PPI community and your experiences at and outside of Rendezvous. As we endeavor to be purposeful with our clients, PPI will continue to evolve as a unique and powerfully connected community. Through Telling Our Stories each of us is helping create the future of PPI.

The Experience of Connection; The Joys of Listening

Padric H.B. Scott, ***AEP®, CAP®, CFP®, President & CEO,*** *Crossroad Capital Partners*

The joy of connection transcends interpersonal relationships. It includes the most important connection of all – the connection to ourselves. Join Padric Scott for a closing keynote addressing the value of self-love as an essential ingredient in the curation of joy.

Purposeful Conversations

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

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

Many of our client families struggle to discuss certain subjects. In this Purposeful Conversation, you will participate in a modality for families to use to process emotional topics with gentle empathy. Tightly facilitated, Samoan Circles offer an opportunity to tell personal stories in a safe and supportive environment. You can choose your level of participation, from simply observing to actively sharing a personal story about the following topic: "people with different levels of access to financial resources." This simple modality is one that you can introduce to your clients when they have important yet loaded matters to discuss.

Plugging In – to a Truly Renewable Energy Source – The Joy of Connection

Don Opatrny, ***LMFT , Principal and Co-Founder,*** *The Lovins Group, LLC*

Gayle Colman,***CFP®, Master Integral Coach™ & Co-Founder,*** *Colman Knight Advisory Group, LLC*

Kanwar Singh, ***CDFA®, Managing Director, Private Wealth Advisor,*** *Merrill® Private Wealth Management*

Much is said about the power of connection in personal relationships, in networking and in business leadership. You are invited to explore a process of re-energizing all these areas of your life while deepening connection with your PPI colleagues. Kanwar, Gayle and Don will use their experience, and their own connection with each other, as they guide you on a journey to find Joy in Connection — both professionally and personally.

MAIN STAGE SPEAKERS

FRED TALKS

Family Meeting Process is the Most Important Tradition for a Family to Pass Down – But How?

Tom Rogerson, *President and CEO,* *GenLeg Co., Inc.*

Having run family meetings for over 270 families, Tom has seen what can go right and what can go wrong. This will be a practical discussion of how to get started with typical agendas and tools to use (and not to use). The least important agenda item at a family meeting is the family money, business and estate plan and yet most families prioritize that above all. Tom will discuss how legacy planning differs from estate planning and how to motivate clients and advisors toward the family meeting process.

From Windmills to Wildebeests: A Journey of Courage and Connection

Doutzen Groothof, *Sociologist, Management Consultant and Coach,* *StandTall*

Join us as we traverse continents alongside Doutzen, a daring Dutch village girl who traded her comfortable life in The Netherlands for a one-way ticket into the unknown in 2015. Discover how her encounters with the Maasai in Kenya and the resilient people of post-genocide Rwanda continue to shape her world, infusing every day with tales of courage, belonging, and the transformative power of connection.

How Planting the Seed of Joy Improves the Quality of Our Presence and Possibilities

akasha, *Ph.D., PCC, Partner / Gardener of Belonging*, *Cultivating Leadership*

If experiencing the joy of connection is how we cultivate possibilities, then how do we plant the seed of joy and nurture it? And what is the seed of joy anyway? We are proposing that it is our presence. Or let's say our attention - the recognition of the quality of our attention AND adjusting our presence to see and receive the highest possible intention others might have. dr. akasha and Dakari will use storytelling to increase our awareness and capacity for seeding joy. They will share 3 moves we will practice together to help cultivate greater possibilities in our lives and relationships.

Celebrate Good Times: The Joys of Family History

Karen McNeill, *PhD, CAP®, Leadership & Legacy Consultant*

The historical record is biased when it comes to family histories. It tends to feature vital statistics, spectacular unicorn feats, or crime, scandal, and trauma. Where is the joy? Much like the voices of women, minorities, the poor and the ordinary, stories about joy and happiness hold important insights into the evolution of the family culture and yet are often lost to the dustbin of history. Attendees will leave this session equipped with easy ways to generate and capture stories about joy, laughter, love, beauty, and other positive elements of a family's long and complex story.

The Power of States over Traits: Understanding the Profound Influence of Our Social Experiences on Issues of Motivation, Grit and Resilience

Ross Ellenhorn, *LICSW, PhD, CEO & Founder,* *Ellenhorn LLC*

Psychiatry and clinical psychology currently hold a kind of monopoly on how we think about a person's motivation toward goals and their personal fortitude in the face of threats and challenges, especially when this person is struggling with significant behavioral health concerns. And yet these skull-bound fields depend often more on theory than science, in how they understand the psychological traits that push forward. Social psychology, on the other hand, has accumulated a wealth of knowledge about these issues, focusing on a person's social state: how much social support they have, how valuable they feel in their community, how isolated they are, etc.

Starting on the Road to JEDI Investing Mastery

Erika Seth Davies, Founder, *The Racial Equity Asset Lab (The REAL) and CEO*, *Rhia Ventures*
Tony Macklin, ***CAP®, Principal,*** *Tony Macklin Consulting*

Often driven by rising generations' interests, families are wrestling with issues of justice, equity, diversity, and inclusion (JEDI). They're increasingly asking about those issues in their personal and philanthropic investments. At the same time, biases in the investment industry can exacerbate inequities in our society and limit clients' opportunities for returns and impact.

How can we facilitate more productive client discussions around JEDI in investing? What resources are available to cut through the noise? Join this session to increase your competency and confidence in discussing opportunities for manager diversity and JEDI-related impact with your clients.

Systemic Enneagram: A Tool for Evolution of the Family System Through Integration and Connection

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

Families often ask our community for help to increase their family connection and unity. Such requests are often explored through the optic of managing individual and collective behaviors. Discover how an understanding of each family member's deepest motivations and concerns can catalyze a shift in these behaviors.

This session invites participants to explore the use of the Systemic Enneagram as a tool to tap into the individual beliefs and worldviews of family members to heighten self-awareness, empathy, and holistic growth in the family system.

Through the analysis of a real-life case study and an interactive discussion, we will explore a pathway for families to evolve through integration and connection.

BREAKOUT SESSIONS

Idea Lab: Mapping the Future of Philanthropic Advising

Alisia Robin, ***Senior Manager, Strategic Partnerships and Nonprofit Outreach,*** *Schwab Charitable*

Dien Yuen, ***JD/LLM, CAP®, AEP®, Executive Director, Center for Philanthropy and Social Impact,*** *The American College of Financial Services*

More firms and family offices are adding philanthropic advising expertise. They're responding to opportunities to guide the intergenerational transfer of wealth, create purposeful legacies, and tackle the world's social and environmental challenges.

What expertise, resources, and connections will this burgeoning field of philanthropic advisors need to meet those opportunities and challenges? In this "mini idea lab" you'll collaborate with peers to build on prototype solutions created by a diverse group of philanthropic advisors. You'll leave better understanding the evolving field of philanthropic advising and what your firm will need next to succeed in it.

Advancing Flourishing: The 10 x 10 Learning Roadmap

Joan DiFuria, ***MFT, Co-Founder,*** *Money Meaning & Choices Institute*

Stacy Allred, ***MST, CPA, CFP, CEPA, Managing Director,*** *First Republic*

Stephen Goldbart, ***PhD, Co-Director,*** *Money Meaning & Choices Institute*

Leveraging decades of experience, we've created a comprehensive model for family members of all ages to build competencies with the goal of addressing the number one desired outcome for families of wealth: to foster a thriving and connected family. Our 10 x 10 Learning Roadmap is comprised of 10 core competencies across 10 life stages. The 10 Competencies are a specific set of capabilities that support the growth of emotionally intelligent, financially effective, and self-sufficient family members.

We're excited to share a model that provides an elevated framework for guiding family consulting work that considers both the challenges and opportunities of wealth, encouraging all family members to look at where they are at now, where they could go, and what they want to learn.

Wealth 3.0 in Action - Case Method Learning

Dennis Jaffe, ***PhD, Senior Research Fellow,*** *Banyan Global Family Business Advisors*

Jim Grubman, ***PhD, Owner,*** *Family Wealth Consulting*

Kristin Keffeler, ***MSM, Principal, Illumination360 & Chief Learning Officer,*** *Johnson Financial Group*

After a brief review of Wealth 3.0, this workshop will focus on two moderately complex high-net-worth (US $5M to about US $30M) cases and their management by consultants. The fact patterns will have a mix of client-centered and advisor-centered issues, demonstrating 3.0-consistent approaches in both domains. Participants will have a chance to discuss and share ideas and techniques, including a demonstration of skills via short role-playing scenarios. Come prepared to stretch your thinking and your skills in a supportive environment.

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

Lindsay Hardie, ***PhD, Clinical Psychologist,*** *Sierra Legacy Consulting, LLC*

Michele Mikeska Jaffe, ***PsyD, Relationship & Wealth Psychologist, Executive Director,*** *FBN-USA*

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.

Cultivating Positive Interactions in Families: A Research-Based Tool for Creating a Healthy Sense of Belonging

Jocelyn Baker, ***Co-Creator,*** *Resilient Family Strategies*

Kristin MacDermott, ***LMFT, Founder & President,*** *MacDermott Method, Inc.*

The secret to self-worth is this: We earn our self-esteem by living in alignment with our strengths, interests, and values, and by having a healthy sense of belonging. Similarly, the secret to joyful relationships is this: Our relationships feel good when we have meaningful interactions revolving around shared strengths, interests, and values, thereby fostering belongingness. Attendees will learn a tool that helps family members identify the unique factors that drive their own self-esteem and serve as jumping off points to cultivate meaningful interactions with their family members. In speed-dating-style, participants will practice this tool, fostering joyful relationships with fellow attendees.

Rethinking How We Advise Versus Educate the Next Gen

Cindy Radu, ***LLB, LLM, TEP, ICD.D, Chief Learning Officer (Canada),*** *Tamarind Learning*

Judy Pearson, ***Family Office and Trustee Liability Group Leader,*** *Woodruff Sawyer*

Kirby Rosplock, ***PhD, Founder and CEO,*** *Tamarind Partners & Learning*

Increasingly families lean on experts and advisors to educate, mentor, and prepare their children for the responsibilities of wealth or a business. This session explores the interesting tension that develops when Now Gen clients want their advisors to also mentor their Next Gen. Using a case, this panel will discuss what happens when an advisor may not be clear on who their client is and how they are engaged. We will walk through this scenario, identify the opportunities, discuss what should have been done - more, better, or differently- and identify best practices to help advisors and families thrive.

Cultivating Cultural Competency: Asian American Perspectives

Elizabeth Nam, ***Managing Director, Head of Family Dynamics,*** *JP Morgan Wealth Management*
Shilpa Mirchandani, ***Lead Family Dynamics Consultant,*** *Wells Fargo*

We aim to educate and provide an interactive experience for advisors to navigate cultural nuances commonly encountered when working with Asian American families. We will (1) share our background and perspectives as members of Asian American immigrant families and (2) facilitate a role-play session. Audience members will be encouraged to explore issues facing Asian Americans by stepping into the role of one of four characters in a wealthy Asian American family. The themes explored include: individuation, roles and responsibilities, communication, and interpersonal relations. We will conclude with another interactive session to debrief on effective ways of working with Asian American families.

NOT a Freudian Slip: Vulnerability and Authenticity: Keys to Being an Effective Planning Professional

Julie Johnson, ***MBA, LMFT, President & CEO,*** *XY Communication*
L. Paul Hood, ***Jr., JD, Consultant, Speaker, Author,*** *Paul Hood Services*

During this highly interactive session, Julie and Paul will demonstrate the importance of authenticity and vulnerability among professional advisors, discussing how these are the ultimate solutions to trust and loyalty. Clients want and need a safe space, a judgment-free zone with their advisors. When clients do not feel that they have this, the client/advisor relationship ultimately leads to dissatisfaction when they experience the stoic professional Freudian blank stare/appearance of professional perfection, which makes clients reticent about telling the whole truth specific to what they need and want and feeling comfortable admitting they don't know what they don't know.

Julie and Paul will briefly share their fallible imperfections, authenticity and how this has made them far better advisors for their clients and an opportunity for attendees to share experiences when they went 'against the grain" in building a client relationship, and how it ultimately created a far deeper and more productive professional bond.

BREAKOUT SESSIONS

Bridging the Divide Between Generations Through Rites of Passage

Jamie Weiner, ***ClinPsyD, Founder and Co-Director,*** *The Quest for Legitimacy*
Kim Schneider Malek, ***Founder,*** *Family Enterprise Alliance, LLC*
Russ Haworth, ***ACFBA, Co-Director,*** *The Quest for Legitimacy*

Transitions, one generation's rise into responsibility while the now generation relinquishes control, is a challenge that requires a uniquely human solution. Traditionally rites of passage have prepared cultures for these transitions.

The absence of clear markers, and rites of passage, results in struggles for control.

Together we'll discover the importance of rites of passage and creating plans that allow the rising generation to gain clarity, experience agency and achieve legitimacy, freeing the now generation to take their place as elders.

Can we bridge the divide by creating effective rites of passage that will impact transitions, purpose-driven inheritance, and effective governance?

Opening New Possibilities for Wealthy Couples

Don Opatrny, ***LMFT, Principal and Co-Founder,*** *The Lovins Group, LLC*
Ruth Steverlynck, ***LL.B hons, FEA, FFI Fellow, Principal,*** *The Lovins Group, LLC*

At the heart of most enterprising families, there is a couple facing a myriad of challenges from premarital planning to new spouse integration, parenting, legacy planning, welcomes, and departures. Helping the couple navigate more skillfully can facilitate shifts in the dynamics of the entire family, enabling them to make better decisions and have a greater impact in the world.

In this experiential workshop, we will explore how relationship dynamics are intensified by significant wealth, and practice exercises that can be used to foster more full-hearted connection during challenging processes with clients, even with our own intimate partners.

Can Advisory Relationships Provide Purposeful Connection?

Evana Lithgow, *Managing Partner,* *Working Minds*
Lindsay Pope, *Principal,* *Trustee Support*

Lindsay and Evana collaborate at the intersection of purposeful trust governance and psychology. This practical workshop will consider ways advisers can collaborate to advance client outcomes where no purposeful intentions have been expressed. Drawing from recent collaborative experiences in New Zealand, Lindsay and Evana will show participants ways to:

- Map a trustscape (relational and ownership connections)
- Identify potential relational issues and challenges
- Build and maintain both family and adviser connection during transitions
- Advance purposeful outcomes for transitioning families

This will be a meaningful conversation to share practical learning and insights and encourage participant comments and questions from the floor.

Challenge Carousel: Cultivating Solutions to the Top Rising Gen Challenges

Allison Lawshe, *Learning Center Program Manager,* *Family Office Exchange*
Mindy Kalinowski Earley, *CMP, CFBA, Chief Learning Officer*, *Family Office Exchange*

In 2022, FOX conducted focus groups and surveyed over 50 rising generation family members to identify their experiences, aspirations, and challenges as rising gen. In this interactive session, we invite you to explore what FOX found, share your own insights, and problem-solve as a community. Through a "challenge carousel," we will brainstorm solutions to the top rising gen challenges. We will harness the collective knowledge and expertise of participants in the room to increase our effectiveness in serving rising gen and their families.

What Do You Do in the Cauldron of Conflict?

Matthew Wesley, *Principal,* *The Lovins Group, LLC*
Valerie Galinskaya, *Managing Director and Head,* *Merrill Center for Family Wealth™*

When we are unprepared for it, conflict can paralyze us as we watch things around us devolve and crumble. Yet without some measure of conflict, honest growth is unlikely. In this session, our team will share what we have found to be most effective in restoring connection; focusing both on our internal management of presence as well as the practical work of helping family members communicate more clearly and effectively on a path to restoration. In doing this, we will open a conversation to learn from one another on the tools and perspectives we have used and the learnings from those experiences. Participants will gain actionable practices and tools to immediately apply both professionally and personally.

Where the Money Magic Happens

Nancy Sharp, ***Speaker, Storytelling and Life Letters Coach***
Sandi Bragar, ***CFP, Chief Client Officer, Partner,*** *Aspiriant*

This engaging, interactive workshop will introduce you to values-based storytelling around money. We'll explore this universal theme through the lens of Guided Autobiography (GAB), an evidence-based storytelling method that fosters self-discovery and community, often among multi-generational audiences. This is a unique opportunity for you to tell some of the stories that have shaped your narrative and views around money--past, present, and future. What role did money play in your family of origin? What has money come to mean to you - power, position, comfort, security, or something else? How does talking about money right now make you feel? These are among the priming questions you'll reflect upon. Walk away with heightened self-awareness, new knowledge about your PPI peers, and easy-to-use tools to use with your own clients. GAB cultivates joyful connections and empathy on the written page and in life.

RENDEZ-COMMUNITY ACTIVITIES

WEDNESDAY, AUGUST 2nd AT 3:00PM - 5:00PM

Multi-Disciplinary Collaboration Workshop

Judi Cunningham, ***MA, FEA, CEPA, Principal,*** *Trella Advisory Group*
Steve Legler, ***MBA, CFA, FEA, Family Legacy Coach & Advisor*** *at TSI Heritage*

As part of PPI's evolving partnership with Family Enterprise Canada (FEC), who run the Family Enterprise Advisor (FEA) program, come and sample some of the tools that FEA program participants experience on the way to achieving their designation.

Program founder and PPI Board Member Judi Cunningham will lead the workshop, joined by longtime PPI Member and FEA designate Steve Legler, as they share some of the curriculum from the Multi-Disciplinary Advising module of the program.

Slow Flow Yoga

Shilpa Mirchandani, ***Lead Family Dynamics Consultant,*** *Wells Fargo*

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.

Heart Coherence Meditation

Randi Hogan, CAP®, ***Founder & President,*** *Hogan Philanthropy Consulting*

Join us for a meditation experience, whether youÕre a beginner or have meditated for years, to connect with your intuitive heart intelligence. We will use a practice grounded in 25+ years of research from the HeartMath Institute.

Discover the power of aligning your heart and mind through a technique that promotes inner harmony, reduces stress, and enhances overall well-being. Immerse yourself in this brief yet impactful session to cultivate a profound sense of calm and unlock the power of your heart's innate intelligence, enabling you to elevate the way you lead and coach families with centeredness and grace.

Film Screening and Discussion: Belonging in the USA: The Story of Michael D. McCarty

Arielle Nóbile, ***CEO/Founder,*** *Legacy Connections Films &* ***PPI Dean of Belonging***

Join us for a sneak preview of Arielle's award-winning documentary, "Belonging in the USA: The Story of Michael D. McCarty," which shines a light on Michael's journey to seek purpose, follow his passion, and find true belonging in the process. From aspiring scientist to Black Panther, FBI target to a soldier in Korea, drug addict to health nut, and beyond, Michael's spiritual journey proves that no matter what life throws at us, we can find our way through. It is slated for a national PBS broadcast in 2024.

The film will be used as a jumping off point to engage in brave, reflective dialogue.
Participants will come away having practiced empathy and compassion around:

• untold parts of our collective history
• the complex personal histories we all carry inside
• practice dialoguing and listening to people's experiences around belonging and othering.

PRE/POST RENDEZVOUS ACTIVITIES

Pre-Rendezvous Workshop: Accessing Ancient Wisdom for Living in Full-Hearted Prosperity

Monday, July 31st
9:00am - 4:00pm MT

Presented by:
Anthony Willoughby, ***Adventurer and Founder,*** *Nomadic School of Business*
Don Opatrny, ***LMFT, Principal and Co-Founder,*** *The Lovins Group, LLC*
Doutzen Groothof, ***Sociologist, Management Consultant and Coach,*** *StandTall*
Polina Crotty, ***CFP, Coach and Collaborating Consultant,*** *The Lovins Group*

Embark on an experiential journey into the many dimensions of visible and invisible wealth and what it means to truly prosper. This Pre-Rendezvous Workshop brings together the ancient wisdom of our ancestors, the insights of modern indigenous communities, and our own values and life experiences, to broaden our thinking and come to greater clarity about our purpose. Led by Don Opatrny, Principal of the Lovins Group, British explorer Anthony Willoughby, and elder of the Maasai people Emmanuel Mankura (joining us live from his home in Kenya) we will experiment with the fast-working, emotionally engaging, and non-threatening methodology they have developed, which is enabling practitioners and clients in the family wealth arena to break out of habitual patterns and articulate inspiring new visions. We will ask essential questions and chart courses to game-changing answers for us, our clients, and the larger community. This full-day session will take place on Monday, July 31st from 9:00am – 4:00pm at the Westin.

Learn More / Register

Pre-Rendezvous Workshop: The Mindset and Spirit of Service: Leveling up Using the Power of Purpose, Delight, and Surprise

Monday, July 31st
1:00pm - 4:00pm MT

Presented by Stephanie West Allen, JD

We all offer our talents, skills, and knowledge to others in our personal and professional lives. In this workshop, we will focus on invigorating those offerings by examining the essence of service using some unexpected processes and thoughtful reflection. We will explore and embrace the value of lightening up and loosening up in order to level up our emphasis on service.

Learn More / Register

White Water Rafting & Mount Evans Trip

Monday, July 31st

For those who are looking for a true Colorado experience and some real adventure! Participants will meet early at the Westin Westminster and travel to Idaho Springs (45 minutes) to the Colorado Adventure Center for a White-Water Rafting trip (intermediate option). Followed by lunch at the adventure center from one of the amazing local restaurants 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

PRE/POST RENDEZVOUS ACTIVITIES

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!

Transportation will be provided. We'll be back in time for the optional opening reception of Rendezvous.

PPI member Jeff Savlov is organizing this trip. 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

E-Bike Adventure

Monday, July 31st

Join us for a fun easy e-mountain/gravel bike ride on Monday, July 31st. We will be departing the Westin Westminster at 10AM and bike from the Specialized Boulder Experience Center to ascend to the Gold Hill Mercantile for some beautiful views and sustenance. Estimated time 3-4 hours. Please note space is limited so first come first serve. Depending on frame size we will be between 5-7 riders. Cost will be around $160 plus ride-share to Boulder and lunch at the mercantile. RSVP by Jul 14, 2023.

PPI member Kjartan Jansen is organizing this trip. For more information or to RSVP, please contact Kjartan directly at graddhaviking@graddha.com with the subject line "e-bike tour".

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

Nature Hike at Chautauqua Park, Boulder

Thursday, August 3rd

Join us for a light to moderate hike in the foothills of Boulder on Thursday afternoon after programming for Rendezvous ends. We'll meet in the lobby of the Westin at 1:30pm and make the 20-minute drive from the Westin to Chautauqua Park in Boulder. Chautauqua Park offers beautiful views and there are several trial heads that range from easy to moderately strenuous.

PPI member Marlis Jansen is organizing this activity. For more information or to reserve your spot, please contact Marlis directly at: marlis@graddha.com.

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

HOTEL RESERVATIONS

The Westin Westminster: We look forward to hosting Rendezvous at the Westin Westminster, 15 minutes from both Denver and Boulder! We have negotiated a very favorable rate for our attendees ($229 per night; promo code provided upon registration).

CANCELLATION POLICY

You may cancel your registration for a full refund if requested prior to or on June 1st. If there are compelling reasons (such as health or family emergencies).

REGISTRATION DETAILS

Visit purposefulplanninginstitute.com/rendezvous/ for pricing, registration information, and special offers.

REGISTRATION & RECEPTION

Stop by the registration table in the Liberty Ballroom Foyer upon arrival to check- in and pick up your name badge and materials. We will be hosting a Welcome Reception on Monday, July 31st from 5:30pm – 7:30pm for those arriving early. If you are arriving on Monday, please plan to stop by the Westminster Ballroom Foyer for refreshments and light hors d'oeuvres.

GALA DINNER

The Gala Dinner will take place on Wednesday, August 2nd at 6:30pm at the Westin Westminster. There is no additional cost for registered attendees. Suggested attire is smart casual.

ART EXPERIENCE ROOM

A chance to step on the power of connection through art experiences. We have a dedicated room to allow for an immersive experience that awakes you to the power of connection.

This year, we will feature a different layer of connection each day:

Day One (July 31st): The beauty in nature connects us with life within and outside of us.
Day Two (August 1st): Gazing at someone else can be a profound experience of connection. Then at the evening open mic/sing-along, experience the power of gazing at each other.
Day Three (August 2nd): Dancing together strengthens our bonds and ignites joy. Then in the evening open mic/sing-along come dance together.

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, August 1st. 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 24th.

OPEN MIC & SING-ALONG

In a long-standing Rendezvous tradition, we will be hosting informal drop-in Open Mic and Sing-Along on Tuesday, August 1st and Wednesday, August 2nd. These will be informal gatherings 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! Share your talent with our community or just join in for fun.

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).

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