



2024

# PURPOSEFUL PLANNING SYMPOSIUM

February 7<sup>th</sup> - 9<sup>th</sup>, 2024

A Better Way, A Better Process,  
A Better Practice Within Reach.

The Purposeful Planning Symposium brings together nationally renowned faculty for unique and engaging educational and professional development opportunities that 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.

Join us February 7th-9th for practical guidance, tips, and substantive materials to elevate your estate, transition, and charitable planning conversations.

All sessions will be delivered through an interactive virtual format that can be enjoyed in the comfort of your home or office while providing opportunities to connect and engage with professionals from across the country and around the world.

All presentations will be recorded and provided for attendees to access for a 30-day period. PPI members will continue to have access to these recorded sessions as long as they maintain an active membership. We strongly encourage you to participate live, as certain highly interactive segments will not be available in the recorded content.

## REGISTRATION DETAILS

**Member Rate: \$395 (\$495 after January 22<sup>nd</sup>)**  
**Non-Member Rate: \$595 (\$695 after January 22<sup>nd</sup>)**

Not a member of the Purposeful Planning Institute? As a bonus, your event registration to the Purposeful Planning Symposium will include a 60-day trial membership to the Purposeful Planning Institute at no additional cost (for new members only).

Register online at <https://purposefulplanninginstitute.com/symposium>

## CONTINUING PROFESSIONAL EDUCATION

This program is accredited for 12 hours of continuing professional education credits through the CFP® Board (live participation only) and 10 CLE credits through the Colorado Supreme Court Office of Continuing Legal and Judicial Education (live and/or recorded programming). Please check our website for the most up-to-date information.

## Wednesday, February 7<sup>th</sup>

Start Time	End Time	Event Name
9:15am	10:30am	<b>Human Aspects of Estate Planning</b> , Martin M. Shenkman, CPA, MBA, PFS, AEP, JD
10:30am	11:00am	Break
11:00am	12:30pm	<b>Breakout Sessions:</b> <b>Legacy, Culture &amp; Equity</b> Dien Yuen, JD, LLM, CAP®, AEP® <b>Advancing Flourishing: The 10 x 10 Learning Roadmap</b> Stacy Allred, MST, CPA, CFP, CEPA   Joan DiFuria, MFT   Stephen Goldbart, PhD

## Thursday, February 8<sup>th</sup>

Start Time	End Time	Event Name
9:15am	10:30am	<b>The Myth of the Silver Spoon</b> , Kristin Keffeler, MSM, MAPP
10:30am	11:00am	Break
11:00am	12:30pm	<b>Breakout Sessions:</b> <b>How UHNW Families are Addressing Communication, Decision-Making and Gifting</b> Valerie Galinskaya, MBA   Phoebe Massey <b>Four Estate Planning Secrets You Can Implement Today</b> Klea D. Harris, Esq.

## Friday, February 9<sup>th</sup>

Start Time	End Time	Event Name
9:15am	10:30am	<b>The Three Keys to Success in the Advising World of Tomorrow</b> , James Grubman, PhD
10:30am	11:00am	Break
11:00am	12:30pm	<b>Breakout Sessions:</b> <b>The Power of Questions</b> Amanda Koplin, LPC <b>The Private Family Trust Company &amp; Powerful Alternatives</b> Al W. King III JD, LLM, AEP (Distinguished), TEP   James N. Paladino JD, LLM   Matthew Tobin, JD

# WEDNESDAY, FEBRUARY 7<sup>TH</sup>

## MAIN STAGE SESSION 9:15AM-10:30AM (MT)

### Human Aspects of Estate Planning

Martin M. Shenkman, CPA, MBA, PFS, AEP, JD

Too often estate planning focuses on technical nuances of complex tax matters, or intricate legal issues, drafting finesse, and almost anything other than the human aspects of estate planning. These latter matters in some instances can be more critical to the success of the plan than the tax, legal, and other planning. Human or personal considerations might be overlooked for a variety of reasons. For some issues, like drug abuse, mental health issues, etc. many clients are uncomfortable or even embarrassed by the issues and are reluctant to talk about them. The most brilliant estate planning cannot help planning for an issue they are not aware of. Sometimes the reluctance to speak might relate to a social stigma, concern over status, or other implications (whether perceived or real). In some instances, the client might not understand that the practitioner can help in a practical sense to address the matter. Example: The client and family are devoutly religious. Regardless of faith, how can planning be tailored to respect and even transmit their religious values? Example: A very wealthy client may be embarrassed to acknowledge that a family member has a gambling or theft issue. Not knowing there can be solutions, why raise the problem? The professional adviser may not be knowledgeable or comfortable dealing with the personal consideration, but it should be addressed. Example: What should be done to protect, while not unduly disempower, a beneficiary living with bipolar disorder? Example: A child is LGBTQ+ what can be done to protect the child's inheritance, right to medical treatment, and bequests to include the child's descendants?

## BREAKOUT SESSIONS 11:00AM-12:30PM (MT)

### Advancing Flourishing: The 10 x 10 Learning Roadmap

Joan DiFuria, MFT, Stacy Allred, MST, CPA, CFP, CEPA, Stephen Goldbart, PhD

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.

### Legacy, Culture & Equity

Dien Yuen, JD, LLM, CAP®, AEP®

How does our cultural background influence how we think about legacy? How does it show up in estate, financial, and philanthropic planning? How do equity and worldview affect how legacy is defined for successive generations? Join us as we explore rituals and how they connect to the notion of legacy. Then dive into deep conversations with your peers to examine how to effectively help clients integrate the past into their present and future plans.

# THURSDAY, FEBRUARY 8<sup>TH</sup>

## MAIN STAGE SESSION 9:15AM-10:30AM (MT)

### The Myth of the Silver Spoon

Kristin Keffeler, MSM, MAPP

The next generation within wealthy families is often said to be born with a silver spoon in their mouths. Perceived as free from life's toughest challenges. "Having it all." But being raised in affluence brings a unique set of pressures and hidden tripwires. Great wealth casts a long shadow. Inheritors commonly face intense familial expectations, public scrutiny, judgment, and confusing or debilitating self-narratives, under which many flounder. And we—as family, friends, and society—slowly lose their contribution to our lives and the common good.

This presentation will shine a spotlight on the next-gen of the affluent, their families, and the ecosystem of professionals who influence them—wealth advisors, estate attorneys, tax attorneys, philanthropic advisors, family office professionals, and career coaches—to identify and confront negative thinking and behaviors related to wealth.

Privately held wealth has great potential to benefit society. But only if it is held by people able and willing to do good with it. Whether you're a rising gen yourself or an advisor who is invested in their success, this presentation will offer a compassionate framework for connecting a rising gen's innate strengths to the embers of their hopes, so that they can move forward creating thriving and impactful lives.

## BREAKOUT SESSIONS 11:00AM-12:30PM (MT)

### How UHNW Families are Addressing Communication, Decision-Making and Gifting

Valerie Galinskaya, MBA and Phoebe Massey

One of the most common questions we've heard from ultra-high net worth families over the last decade is: What are the families who have managed to sustain wealth and values practically doing?

Join Valerie Galinskaya, Managing Director and Head of the Merrill Center for Family Wealth, and Phoebe Massey, Vice President of the Merrill Center for Family Wealth, as they share key insights from the team's newest whitepaper, Pulling Back the Curtain which shares the key findings from the Center's study of 270+ UHNW families, across the topics of communication, decision-making and gifting, and provides concrete, actionable insights for families.

### Four Estate Planning Secrets You Can Implement Today

Klea D. Harris, Esq.

The current model of estate planning is a missed opportunity to heal our client families in lasting and powerful ways. While a good estate plan complies with law, it must also be guided by love because it is the legal document where the generations meet. We will discuss four simple estate planning secrets, any of which you could implement immediately for lasting impact on your clients and their families.

# FRIDAY, FEBRUARY 9<sup>TH</sup>

## **MAIN STAGE SESSION 9:15AM-10:30AM (MT)**

### **The Three Keys to Success in the Advising World of Tomorrow**

**James Grubman, PhD**

Over the past four years, PPI has looked back at the foundations of family wealth advising and ahead to the advent of the next major transformation – Wealth 3.0, now underway. The new paradigm is already catalyzing the field as a stronger, more positive, and more collaborative professional discipline with roots in estate planning, finance, philanthropy, family dynamics, and governance. In this closing keynote, PPI Fellow Jim Grubman will outline how the information gained in the symposium will help prepare advisors for a future that is more complex, diverse, global, and integrated. He will speak to the three major skill areas that will open the door to greater success for attendees, personally and professionally.

## **BREAKOUT SESSIONS 11:00AM-12:30PM (MT)**

### **The Private Family Trust Company & Powerful Alternatives**

**Al W. King III, JD, LL.M., AEP (Distinguished), TEP, James N. Paladino JD, LL.M., Matthew Tobin, JD**

40% of families now gift their assets through trusts compared with 12.5% in 1995. Directed trusts, special purpose entities, trust protector companies, regulated and unregulated private trust companies all have played integral roles in this increased and growing popularity of trusts. The session will focus on the important reasons and ways families are utilizing these popular trust administration options for governance and the promotion of family values. As well as other powerful tax and non-tax reasons.

### **The Power of Questions**

**Amanda Koplin, LPC**

Tony Robbins said, "The quality of your life is a direct reflection of the quality of questions you are asking yourself." In this session, we will learn more about what makes a quality question and how to create powerful questions to move ourselves and our clients forward in our day-to-day lives.



# SPONSORS

The Purposeful Planning Institute relies on the generous support of sponsors and strategic partners to achieve our vision elevating our industry to a new standard and empowering advisors and the families they serve to make more positive and enduring impacts. Aligning yourself with the Purposeful Planning Institute demonstrates that you're an industry leader and committed to mastering and promoting the principles and practices of client-centered planning.

## PLATINUM LEVEL



Family  
Office  
Exchange

**J.P.Morgan**  
Wealth Management



## SILVER LEVEL



**Arabella**  
Advisors

**COREnology**  
*Connecting People with Purpose*



**FAR**  
FUND FOR ACADEMIC RENEWAL



**KOPLIN**  
CONSULTING

**MuseumExchange**



THE  
**AMERICAN  
COLLEGE**  
OF FINANCIAL SERVICES®