



Purposeful Planning Institute

REQUEST FOR PROPOSALS

2025 Rendezvous
Monday, July 28th – Thursday, July 31st, 2025
The Westin, Westminster, Colorado

Thank you for your interest in facilitating a breakout session at the 2025 Rendezvous. To be considered as a presenter or breakout session facilitator, please review the guidelines and complete the [Session Information Form](#).

Submission Deadline: Monday, January 20, 2025

About the 2025 Rendezvous

Rendezvous offers an enriching learning experience aimed at promoting best practices for legacy families and family businesses, and fostering collaboration among advisors and consultants.

This year's theme, **Navigating Change: Building Capacity. Empowering Wellbeing**, emerged from the understanding that the pace of change is accelerating and can be overwhelming. We can't get ahead of it, and we can't manage it alone. Through connection and collaboration, we can go from struggle to strength, expand capacity, and empower wellbeing in ourselves and our clients.

Proposal Guidelines

The Wisdom Expedition selection committee strongly recommends reviewing the [online submission form](#) prior to completing your proposal. Familiarizing yourself with all required fields will ensure a thorough, accurate, and easy submission.

One Proposal/Breakout per Attendee: To maintain balanced participation and ensure a diverse program, there is a one proposal and one breakout session limit per attendee/member.

Highlight Key Themes: Clearly identify how your session connects with prominent themes in family wealth, family business, and legacy. Upon submission, you'll be asked to categorize your proposal using the content areas under our [four pillars](#). Please do your best to identify a primary content area that your session addresses.



Purposeful Relationships and Individual Well-Being

Purposeful Family Enterprise Techniques and Structures

Purposeful Sustainability

Building a Thriving and Sustainable Practice



Indicate Learning Stage: Specify the intended learning stage for participants (introductory, intermediate, or advanced), ensuring content aligns with the knowledge level of your target audience.

Topic Relevance: Make a clear case for the relevancy and timeliness of your topic, explaining its significance for the Rendezvous community and its connection to current trends, research, or challenges in the field.

Collaborative Teams: We encourage proposals that involve multiple facilitators from different organizations, backgrounds, and experiences. Proposals should include at least one facilitator who has familiarity with our unique session format, either through presenting or attending Rendezvous in the past.

Interdisciplinary Approach: Breakout sessions should be designed to be interactive and experiential and facilitate peer-to-peer learning. As such proposals integrating perspectives from interdisciplinary fields, practical tools, and creative opportunities for self-reflection and learning are highly valued.

Focus on Learning, Not Promotion: Proposals solely centered on specific products or services will not be accepted.

Session Structure and Format Considerations

Each breakout session will be 75 minutes and should prioritize engagement over presentation. Please utilize these guidelines for structuring your session:

Minimize Presentation Time: Limit your “on-stage” speaking to 20 minutes. Use this time to frame the session with a compelling question, a framework, or a few key insights, but focus on facilitating rather than lecturing for the majority of the session.

Engage Multiple Senses: We encourage facilitators to design sessions that engage multiple senses by incorporating interactive exercises, case studies, dynamic activities, visual aids, and/or movement. This approach ensures participants are actively involved in the learning process rather than passively listening to a lecture. Proposals should move beyond traditional presentations and instead describe, in detail, how attendees will experience the session. The more explicit and creative your description of the interactive elements - whether it's a game, role-playing exercise, group activity, or other hands-on approach - the stronger your submission will be. Demonstrate how your session will create memorable and meaningful takeaways that participants can directly apply to their own family, business, or professional situations

Include Thought Leadership and Research: Integrate relevant research, insights, and thought leadership that aligns with the session’s theme. Offering current findings or building off past PPI sessions can enhance depth, credibility, and value for participants.



Selection Process

Selection Criteria: All proposals are evaluated by The Wisdom Expedition selection committee using a rubric designed to ensure fairness, alignment with conference goals, and the highest quality content. The more detailed and clear the proposal is in these key areas, the better it will inform the committee's selection process.

Interactivity: High priority is given to sessions with minimal presentation time that promote active engagement and peer-to-peer learning.

Diversity: We value facilitation groups that reflect diverse perspectives and experiences.

Relevance to Core Topics: Sessions related to family wealth, family business, and family office situations are particularly welcome. Additionally, sessions featuring the voices of clients (case studies, etc) are highly encouraged.

Theme Alignment: Submissions that include relevance to this year's theme are encouraged, but not mandatory. Please draw the link to this year's theme if relevant.

The Wisdom Expedition selection committee will review all proposals received by the deadline and notifications will be sent in early March.

Contact Information

For questions or further information, please contact Shannon Mulvaney at 720-458-7777 or via email at shannon@purposefulplanninginstitute.com