



 Purposeful Planning Institute

# 2025 SPONSORSHIP OPPORTUNITIES

# GET TO KNOW PPI

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The Purposeful Planning Institute (PPI) is a nonprofit learning center for advisors, consultants, and family office professionals, and a platform for networking and collaboration. Our members are financial advisors, estate planning attorneys, trust officers, wealth managers, family business consultants and coaches, philanthropic consultants and other professionals and consultants serving HNW & UHNW families and families in business.

We understand that non-financial or qualitative factors determine a family’s long-term success or failure, and we recognize that providing families with the guidance and tools to enhance their non-financial wealth is a significant opportunity and challenge.

PPI aims to provide resources, tools, and a community of experts to help evaluate a family’s non-financial wealth and develop concrete action plans to support their families and family enterprises in areas such as rising gen learning and development, transitioning leadership, governance, intergenerational communication, philanthropy and more.

Most of our members are senior practitioners with decades of experience. Our members have helped families and family enterprises around the world invest in and grow all dimensions of their wealth. They are pioneering the innovative practices that are defining the path to family flourishing.

## OUR MEMBERS

### *Top Membership Levels*

CFPs, Family Wealth Advisors & Trustees.....	23%
Family Business Consultants & Coaches.....	17%
Estate Planning Attorneys & Tax Professionals.....	14%
Philanthropy Professionals & Consultants.....	8%
Family Office Professionals & Consultants.....	6%
Legacy Planners & Consultants.....	5%
Ten+ Other Disciplines Serving HNW & UHNW Families.....	27%

## PPI BY THE NUMBERS

### *At-a-Glance*

- 550+ Active Members
- 5,600+ Contacts on PPI Mailing List
- 2,000+ Followers on PPI LinkedIn Business Page
- 10,000+ Members on Various PPI LinkedIn Groups
- ✓ Early Adopters
- ✓ Highly Collaborative
- ✓ Gatekeepers to HNW & UHNW Families

# NEW! ORGANIZATIONAL PARTNER

\$20,000

## YEAR-LONG RECOGNITION

- ✓ Listing as Organizational Partner with company logo and link featured on PPI website(s)
- ✓ One dedicated email broadcast to PPI members, allowing you to share information about your company/products (restrictions apply)
- ✓ Corporate Group Membership (one-year membership for up to five individuals)
- ✓ Exclusive Podcast Sponsorship, offering high visibility as the sole sponsor of a selected podcast episode
- ✓ Exclusive Webinar Sponsorship with your logo prominently displayed on all promotional materials, including invitations, registration pages, and follow-up emails for a selected webinar

## RENDEZVOUS

- ✓ Opportunity to host an exhibitor table in a featured location (6-foot table)
- ✓ Listing as Organizational Partner on event website, brochure, and on-site signage
- ✓ Listing as Organizational Partner on dedicated event sponsor pages
- ✓ Five (5) complimentary event registrations to Rendezvous
- ✓ Opportunity to purchase up to five (5) additional Rendezvous registrations at 50% off published price
- ✓ Opportunity to host a roundtable discussion over breakfast and/or lunch and up to two (2) dinner groups
- ✓ Invitation to give a 2-3 minute overview of your company during the Gala Dinner
- ✓ Badge ribbon identifying your firm representatives as sponsors
- ✓ Announcement of Organizational Partner on PPI LinkedIn Group (over 3,000 members)

## SYMPOSIUM

- ✓ Opportunity to give a 2-3 minute overview of your company during Opening Remarks
- ✓ Listing as Organizational Partner on event website, brochure, and event app
- ✓ Five (5) complimentary event registrations to Symposium
- ✓ Listing as Organizational Partner on dedicated event sponsor pages
- ✓ Opportunity to purchase up to five (5) additional Symposium registrations at 50% off published price
- ✓ Announcement of Organizational Partner on PPI LinkedIn Group (over 3,000 members)

# RENDEZVOUS

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*July 28-July 31, 2025 Westminster, Colorado*

Rendezvous is the premier event offering one-of-a-kind learning and networking opportunities for PPI Members and guests. This event will bring together individuals representing more than 20 disciplines and professions for two and a half days of in-person collaborative dialogue, keynotes, and breakout sessions centered on best practices for legacy families and families in business. Rendezvous offers open-space inspired learning through interactive peer-facilitated breakout sessions on highly popular topics.

This year, we will be capping the attendance at Rendezvous to ensure the highest quality participation in our events. In past years, we have sold out and closed registration early. Secure a spot for you and your team by confirming your sponsorship today!



# PURPOSEFUL PLANNING SYMPOSIUM

February 12-14, 2025 | Virtual Event

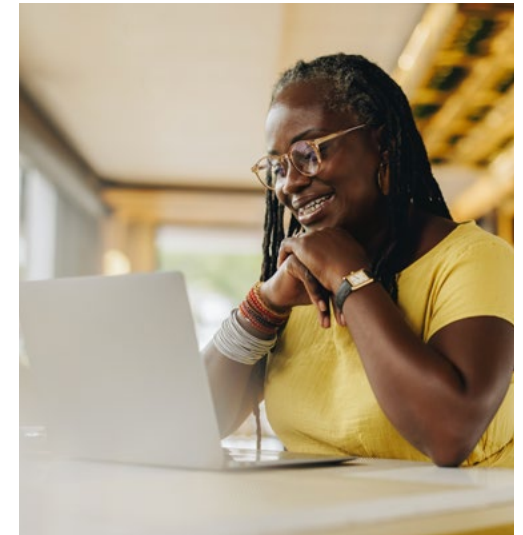
The Purposeful Planning Symposium is a cutting-edge virtual event designed for estate planning attorneys, financial planners and advisors, and other professionals and consultants who want to help clients create more meaningful, more positive, and more sustainable plans. This event will bring together nationally renowned faculty for unique and engaging educational and professional development opportunities that will showcase the benefits of infusing best practices from the domains of relational, philanthropic, and legacy planning into the technical aspects of estate planning and wealth management. The Purposeful Planning Symposium will be delivered through an interactive virtual format that can be enjoyed in the comfort and convenience of your home or office, while providing opportunities to connect and engage with professionals from across the country and around the world.

**By sponsoring both events you will receive a 15% discount on the individual event sponsorship prices.**

Being a sponsor provides your firm exposure and access to a very targeted demographic. Our members are predominantly senior practitioners with decades of experience, and they are pioneering many of the innovative practices that are redefining how advisors and consultants work with families of wealth. Plus, we are successfully attracting a new generation of young advisors, who are early adopters, highly collaborative, and dedicated to best practices and impeccable service.

Sponsorship applications will be carefully reviewed and evaluated to ensure sponsors are a good fit and further the mission and vision of PPI. Complete and return this sponsorship application form right away to be considered.

If you have questions or would like to create your own custom sponsorship package, contact us at 720-458-7777 or [info@purposefulplanninginstitute.com](mailto:info@purposefulplanninginstitute.com).



# PLATINUM EVENT SPONSOR



Platinum \$13,600 | *Rendezvous Only: \$10,000* | *Symposium Only: \$6,000*

## RENDEZVOUS

- Listing as Platinum Level Sponsor with company logo on event website and dedicated sponsor page
- Listing as Platinum Level Sponsor in event brochure, event app, and on-site signage
- Inclusion in pre-event email broadcast to event attendees recognizing sponsors
- Opportunity to host an exhibitor table in a featured location (6-foot table)
- Opportunity to host a roundtable discussion over breakfast and/or lunch
- Opportunity to host two (2) dinner groups
- Opportunity to give a 2-3 minute overview of your company during the Gala Dinner
- Three (3) complimentary event registrations
- Two (2) complimentary gala dinner tickets for additional guests
- Opportunity to purchase up to five additional event registrations at 50% off published price
- Badge ribbon identifying your firm representatives as sponsors

## SYMPOSIUM

- Listing as Platinum Level Sponsor with company logo on event website
- Listing as Platinum Level Sponsor in event brochure and event app
- Inclusion in pre-event email broadcast to event attendees recognizing sponsors
- Opportunity to give a 2-3 minute overview of your company during the Opening Remarks
- Three (3) complimentary event registrations
- Opportunity to purchase up to five additional event registrations at 50% off published price

## GENERAL

- Corporate Group Membership (one-year membership for three individuals)
- Announcement of Platinum Level Sponsorship on PPI LinkedIn Group (over 3,000 members)

# GOLD EVENT SPONSOR



Gold \$10,795 | *Rendezvous Only: \$8,500* | *Symposium Only: \$4,200*

## RENDEZVOUS

- Listing as Gold Level Sponsor with company logo on event website and dedicated sponsor page
- Listing as Gold Level Sponsor in event brochure, event app and on-site signage
- Inclusion in pre-event email broadcast to event attendees recognizing sponsors
- Opportunity to host an exhibitor table (6-foot table)
- Opportunity to host a roundtable discussion over breakfast and/or lunch
- Opportunity to host a dinner group
- One (1) complimentary event registration
- One (1) complimentary gala dinner ticket for an additional guest
- Opportunity to purchase up to three additional event registrations at 50% off published price
- Badge ribbon identifying your firm representatives as sponsors

## SYMPOSIUM

- Listing as Gold Level Sponsor with company logo on event website
- Listing as Gold Level Sponsor in event brochure and event app
- Inclusion in pre-event email broadcast to event attendees recognizing all sponsors
- One (1) complimentary event registration
- Opportunity to purchase up to three additional event registrations at 50% off published price

## GENERAL

- Announcement of Gold Level Sponsorship on PPI LinkedIn Group (over 3,000 members)
- One (1) PPI Individual Premium Membership (one year)

# SILVER EVENT SPONSOR



Silver \$6,545 | *Rendezvous Only: \$5,200* | *Symposium Only: \$2,500*

## RENDEZVOUS

- Listing as Silver Level Sponsor with company logo on event website and dedicated sponsor page
- Listing as Silver Level Sponsor in event brochure, event app and on-site signage
- Inclusion in email broadcast to event attendees recognizing sponsors
- Opportunity to host a roundtable discussion over breakfast and/or lunch
- Opportunity to host an exhibitor table (6-foot table)
- Opportunity to host a dinner group
- One (1) complimentary event registration
- Opportunity to purchase one additional event registration at 50% off published price
- Badge ribbon identifying your firm representatives as sponsors

## SYMPOSIUM

- Listing as Silver Level Sponsor with company logo on event website
- Listing as Silver Level Sponsor in event brochure and event app
- Inclusion in email broadcast to event attendees recognizing all sponsors
- One (1) complimentary event registration
- Opportunity to purchase one additional event registration at 50% off published price

## GENERAL

- Announcement of Silver Level Sponsorship on PPI LinkedIn Group (over 3,000 members)

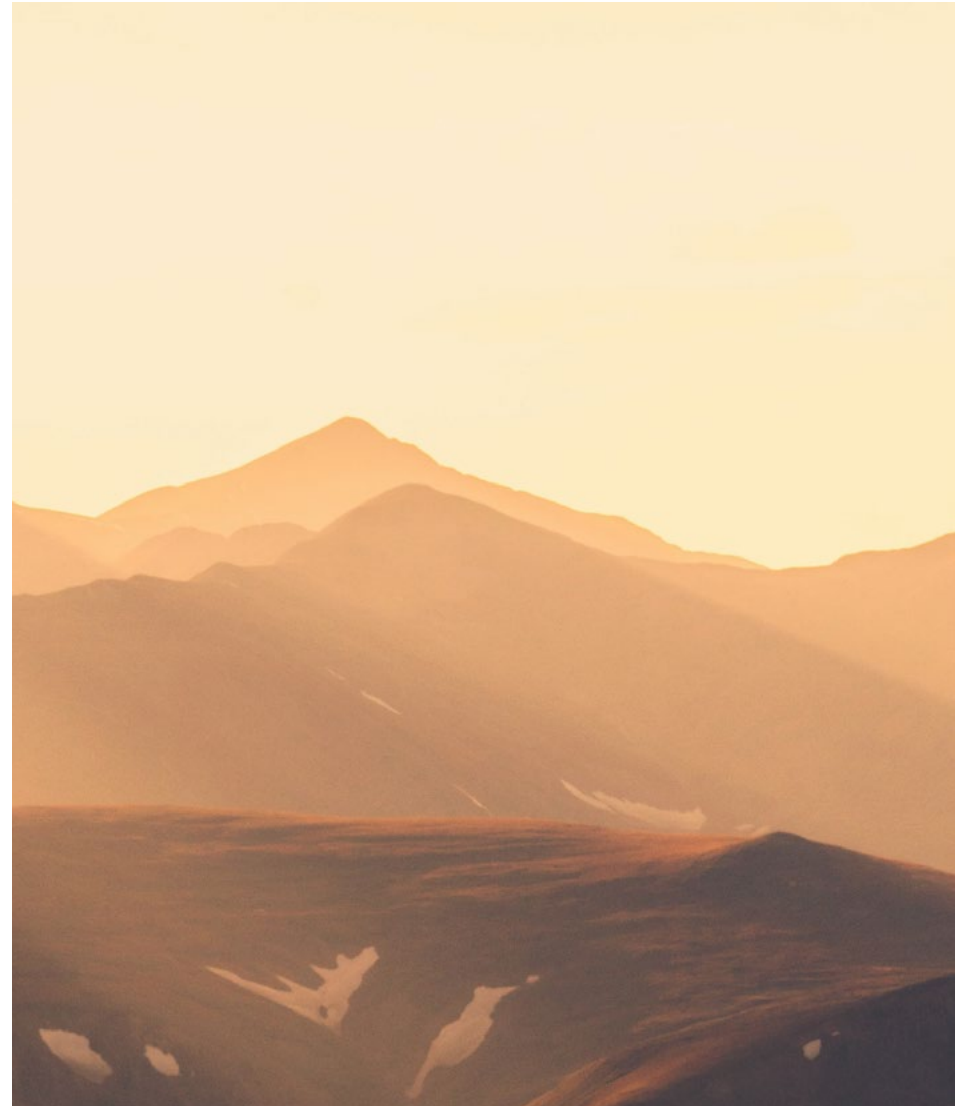


# NEW! RENDEZVOUS EXHIBITORS

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\$3,000

- Listing as Exhibitor with company logo on event website and dedicated exhibitor page
- Listing as Exhibitor in event brochure, event app and on-site signage
- Opportunity to host an exhibitor table (6-foot table)
- One (1) complimentary event registration
- Badge ribbon identifying your firm representatives as Exhibitors



# 2025 SPONSORSHIP COMMITMENT FORM

Yes! We are committing to be a sponsor at the level indicated below:

- Corporate Partner** \$20,000     **Platinum** \$13,600     **Gold** \$10,795     **Silver** \$6,545     **Rendezvous Exhibitor** \$3,000

## ADD-ONS, CUSTOMIZED SPONSORSHIP, AND STRATEGIC PARTNERSHIP OPPORTUNITIES:

### Individual Event Sponsorship

- Rendezvous Only Platinum Sponsorship - \$10,000
- Rendezvous Only Gold Sponsorship - \$8,500
- Rendezvous Only Silver Sponsorship - \$5,200
- Symposium Only Platinum Sponsorship - \$6,000
- Symposium Only Gold Sponsorship - \$4,200
- Symposium Only Silver Sponsorship - \$2,500

### Rendezvous Individual Items

- Welcome Receptions (Newcomer and Main) - \$10,000
- Gala Dinner - \$13,000
- Keynote Speaker - \$10,500
- Name Badges and Lanyards - \$2,000
- Video Recording Package - \$7,500
- Experience Room - \$1,500
- Open Mic and Sing-Along - \$1,500
- Rendez-Community Somatic Activities - \$1,500

### Symposium Individual Items

- Keynote - \$1,000
- Virtual Happy Hour - \$1,000
- Event Platform - \$3,000

\_\_\_\_\_  
*Company Name*

\_\_\_\_\_  
*Signature of Authorized Company Official or Representative*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Contact Name*

\_\_\_\_\_  
*Contact Phone*

\_\_\_\_\_  
*Contact Email*

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*City/State/Zip*

Please return this application by fax to 866-611-6926 or via email to [info@purposefulplanninginstitute.com](mailto:info@purposefulplanninginstitute.com).

# SOLICITATION GUIDELINES & CODE OF CONDUCT FOR PPI SPONSORS

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The Purposeful Planning Institute relies on the generous support of sponsors and strategic partners to achieve our vision of creating a Purposeful Planning Revolution that transforms the way estate and financial planning is done. 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.

By becoming a sponsor, you are supporting the Purposeful Planning Institute and its mission to educate, empower, and develop family advisors to cultivate family flourishing and individual wellbeing.

It is key to our success to have strategic sponsors who align with our purpose and mission and who in turn will benefit from deeper connections with PPI's membership.

For these reasons, we have developed the following Solicitation Guidelines & Code of Conduct for PPI Sponsors that we ask you to become familiar with. Our goal is to create a safe environment for professional advisors and consultants, family office professionals, and client families that promotes collaboration, openness and sharing. Hard selling is strictly prohibited within the PPI community.

- As outlined in our Sponsorship Opportunities, Corporate Partners are permitted to send a dedicated email broadcast to PPI members, sharing information about their company. Platinum, Gold, and Silver sponsors will be included in a group email broadcast, announcing all event sponsors. All communications from sponsors to PPI members and event attendees will undergo an editorial review process by the Purposeful Planning Institute and will be sent by PPI on behalf of the sponsor.
- PPI **will not distribute** attendee contact information to sponsors. Sponsors ARE STRICTLY PROHIBITED from using participant lists (and access to Guidebook, the Connecting Point, etc.) for the purposes of direct marketing or solicitation.
- Sponsors are welcome to collect business cards and contact information from event attendees and if that information is given freely sponsors are welcome to follow-up with those individuals and firms to invite them to join the Sponsor's mailing list. Sponsors may offer prizes or special incentives at their booths as a means of collecting business cards. Please note, Canada's Anti-Spam Legislation has strict guidelines around implied consent (giving a business card) and express consent which apply to any Canadian PPI member or event attendee you make contact with, even though that contact occurs in the U.S. Please be sure you are following all national and international anti-spam regulations.
- All attendees (including sponsors) are asked to present a business card only when asked for one. You are welcome to ask another participant for their card, which usually prompts the other individual to offer you their business card or contact information in return.

Failure to adhere to PPI's Solicitation Policy and Code of Conduct may result in the forfeiture of PPI membership and/or being prohibited from attending future PPI events such as the Purposeful Planning Symposium and Rendezvous.