Purposeful Planning Institute

13th Annual

Rendezvous

July 28 - 31, 2025

Navigating Change: Building Capacity. Empowering Wellbeing.

In 2025, the 13th annual in-person gathering for PPI members and guests will be held at the Westin Westminster. Rendezvous remains the premier and most professionally diverse event of its kind. This year's Rendezvous will bring together professionals representing over 20 disciplines for collaborative dialogue, inspiring keynotes, and engaging breakout sessions focused on family dynamics, governance, collaboration, philanthropy, and personal development and growth. Renowned for its unique atmosphere and unparalleled learning and networking opportunities, Rendezvous continues to be a standout event in the professional community.

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**
- **Personal Development & Growth**
- **Professional Collaboration**

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

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

Nathan Dungan, Founder & President, Share Save Spend®

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

Amanda Koplin, CEO of Koplin Consulting

Michele Mikeska Jaffe, PsyD, Executive Director, Family Wealth Services, J.P. Morgan Wealth Management

John A. Warnick, Esq., Founder, Purposeful Planning Institute

Wisdom Expedition

Michele Mikeska Jaffe, PsyD, Executive Director, Family Wealth Services, J.P. Morgan Wealth Management

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

Joseph Kuo, Partner, Financial Life Focus, LLC

Jacob Mattox, FBS®, Relationship Manager, Family Office Exchange

Isabel Miranda, JD, Managing Member, Pearlman & Miranda, LLC

Janell Turner, CAP, Managing Director, Phīla Engaged Giving

John A. Warnick, Esq., Founder, Purposeful Planning Institute

Experience Expedition

Amanda Koplin, CEO of Koplin Consulting

Perry Gladstone, Purpose & Legacy Coach & Advisor, Perry Gladstone Consulting

Lindsay Hardie, PhD, Legacy Coach, Sierra Legacy Consulting

Kaley Hudson, Coach & Program Coordinator, Legacy Capitals, LLC

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

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

AGENDA

Monday, July 28th *All times listed are in Mountain Time (MT)

Start	End	Event Name	Speaker(s)	Room
9:00am	4:00pm	Pre-Rendezvous Activities		Off Site
1:00pm	7:00pm	Impact Room		Cotton Creek I
4:00pm	7:30pm	Registration		Westminster Foyer
4:45pm	5:30pm	Newcomers Reception		Westminster II
5:30pm	7:30pm	Welcome Reception		Westminster Foyer

Tuesday, July 29th *All times listed are in Mountain Time (MT)

Start	End	Event Name	Speaker(s)	Room
6:30am	8:00am	Registration		Westminster Foyer
7:00am	5:00pm	Impact Room		Cotton Creek I
7:00am	7:50am	Breakfast & Optional Roundtable Discussions		South Courtyard
8:00am	8:30am	Welcome & Opening Remarks		Legacy Ballroom
8:30am	9:30am	Opening Keynote: We're All in This Together: Living, Learning, and Leading Through Change	Mike Robbins	Legacy Ballroom
9:30am	10:15am	Break		
10:15am	11:30am	**Breakout Sessions**		
		Building Purposeful Well-Being Trusts: Opportunities for Creating Supportive Relationships and Structures in Advance	Dan Felix, Kristin Keffeler	Westminster I
		Empowering Family Values: Designing the Family Enterprise with Philanthropy as a Core Dimension	Joseph Brooks, Betsy Erickson, Sara Hamilton	Westminster II
		Brave New Digital World: How Can Families Navigate Wealth Together in an Evolving Cyber World?	Valerie Galinskaya, Shilpa Mirchandani, Lauren Ogg, Charles Eckhart	Westminster III
		Not Just Watering the Flowers: Help Clients Cultivate Deep Roots and Create a Strong Legacy	Natalie White, Karen McNeill	Westminster IV
11:30am	1:00pm	Lunch & Optional Roundtable Discussions		South Courtyard
1:00pm	3:00pm	Change Starts With You	Melissa Mitchell-Blitch, Lisa Orlick, Josh Gentine	Legacy Ballroom
3:00pm	3:45pm	Break		
3:45pm	5:00pm	**Breakout Sessions**		
		Moving Beyond Flat to Rising Gen Up…	Lori Coonen, Rod Zeeb	Westminster I
		A Generous Life: What We Can Learn from Peter Karoff (1937-2017) About Elevating Philanthropy and its Power to Inspire Lifelong Learning, Growth, and Change	Leslie Pine, Melinda Marble, Jay Hughes	Legacy Ballroom
		Navigating the Experience of Marrying in to Wealth: How Advisors, Families, and Spouses Can Transcend Stigma	Lindsay Hardie, Nathan Dungan	Westminster II
		Lessons from the Crucible: Healing the Family System for a Regenerative Legacy	Elizabeth T. Boatwright, Peter W. Johnson, Jr.	Westminster III
6:00pm	8:00pm	Dinner Groups (Optional)		South Courtyard
8:30pm	10:00pm	Open Mic & Sing-Along (Optional / Drop-In)		South Courtyard

AGENDA

Wednesday, July 30th *All times listed are in Mountain Time (MT)

Start	End	Event Name	Speaker(s)	Room
7:00am	5:00pm	Impact Room		Cotton Creek I
7:00am	7:50am	Breakfast & Optional Roundtable Discussions		South Courtyard
8:00am	8:30am	PPI Update, Q&A		Legacy Ballroom
8:30am	10:00am	FRED (Frank, Relevant, Educational and Dynamic) Talks		Legacy Ballroom
10:00am	10:30am	Break		
10:30am	11:45am	**Breakout Sessions**		
		The Gift of the Outlier: Facilitating Growth Through Family Tensions	Luke Jernagan, Matt Wesley	Westminster I
		Wait a Sec, How Many People Are You Married To? Estate Planning for Blended and Polyamorous Families	Emily Bouchard, Michael Blacksburg	Westminster II
		Navigating Change Together: A Collaborative Approach to Intentional Wealth Spend-Down	Sofia Michelakis, Nicholas Palahnuk	Westminster III
		Metamorphosis: Navigating the Six Essential Transformations in Family Business Transitions	Elizabeth Ledoux, Andrea Carpenter	Westminster IV
11:45am	1:00pm	Lunch & Optional Roundtable Discussions		
1:00pm	2:15pm	**Breakout Sessions**		
		Enhancing the Future of Wealth: A Collaborative Approach to Family Engagement and Legacy Services in Your Practice	Mitchell Spearman, Emily Barbour	Westminster I
		Growing up in Enterprising Families: Reconciling Challenging Dichotomies	Doug Baumoel, Paul Edelman	Westminster II
		Cultivating Healthy Client Decisions: A Paradigm of Relational Success	Caren Croland Yanis, Dr. Paul Hokeymeyer	Westminster III
		Beyond Taboos: Empowering Family Enterprises to Embrace Diversity and Navigate Life's Transitions	Natalie McVeigh, Sandra Pollack	Westminster IV
2:15pm	3:00pm	Break		
3:00pm	5:00pm	**Rendez-Community (Variety of Educational and Somatic Events)**		
		Yoga	Carey Spencer	Westminster I
		Moments that Matter - Story Sharing Activity	Marlis Jansen, Amanda Koplin	Westminster II
		Mutual Mentor Speed Dating	Perry Gladstone, Tina Sula	Westminster III
6:00pm	6:30pm	Cocktails and Connection		Legacy Foyer
6:30pm	8:00pm	PPI Community Banquet		Legacy Ballroom
8:00pm	10:00pm	Open Mic & Sing-Along (Optional / Drop-In)		South Courtyard

Thursday, July 31st *All times listed are in Mountain Time (MT)

Start	End	Event Name	Speaker(s)	Room
6:30am	1:00pm	Impact Room		Cotton Creek I
7:00am	7:50am	Breakfast & Optional Roundtable Discussions		South Courtyard
8:00am	10:00am	PPI Fellows Forum on Wellbeing	Nathan, Dungan, Courtney Pullen, Kristin Keffler, Mary Duke, Stephanie West Allen, Jim Grubman	Legacy Ballroom
10:00am	10:45am	Break		
10:45am	12:00pm	Closing Keynote: Change Disrupts, Disruption Creates	Susan Bradley	Legacy Ballroom
12:00pm	1:00pm	Lunch & Optional Roundtable Discussions		South Courtyard
1:30pm	8:00pm	Post-Rendezvous Activities		Off Site

MAIN STAGE SESSIONS

Tuesday, July 29th *8:00am-9:30am*

We're All in This Together: Living, Learning, and Leading Through Change

Mike Robbins, Keynote Speaker and Author

We find ourselves in a time of massive disruption right now. The one constant amid all the change, stress, and uncertainty we face at work and in life these days is us.

When we take ownership and responsibility for our experience, we not only make it easier to navigate the changes we face...we can also empower ourselves and those around us to stay focused and keep things in perspective, regardless of the circumstances.

This interactive keynote, which is based on the core principles of Mike Robbins' work and research over the past 25 years, illustrates how we can navigate change effectively and thrive in the process.

Tuesday, July 29th *1:00pm-3:00pm*

Change Starts With You

Melissa Mitchell-Blitch, MS, MA, Family Business & Wealth Consultant, Eredita Consulting
Lisa Orlick, Founder, Lisa Orlick Coaching & Consulting, LLC
Josh Gentine, President, Bench Consulting

Building on Mike Robbins' keynote insights, this hands-on session invites you to practice accessing a growth mindset, authenticity, and appreciation to help you navigate change for you and your clients.

Wednesday, July 30th 8:00am-8:30am

PPI Update and Q&A

Join us for a brief organizational update where PPI leadership will share key updates on strategic initiatives, upcoming events, and evolving content priorities. This session will also include an open Q&A, giving members the opportunity to engage directly with staff and leadership.

Thursday, July 31st *8:00am-10:00am*

PPI Fellows Forum on Wellbeing

Nathan Dungan, Owner, CEO, Share Save Spend

Mary Duke, JD, TEP, CMA, Independent Advisor to Families

James Grubman, PhD, Owner, Family Wealth Consulting

Kristin Keffeler, MSM, MAPP, Chief Learning Officer, Johnson Financial Group & Principal, illumintaion360

Courtney Pullen, MA, LPC, President, Pullen Consulting Group

Stephanie West Allen, JD, Mediator, Speaker, and Writer

Join PPI Fellows for an engaging panel discussion exploring the five elements of wellbeing—Career, Social, Financial, Physical, and Community. This session will begin with a focus on personal wellbeing, offering insights and reflections from our esteemed panelists, before shifting to practical applications for working with clients. Through facilitated discussions, attendees will gain new perspectives and actionable strategies to support holistic wellbeing in their personal and professional lives.

Thursday, July 31st *10:45am- noon*

Change Disrupts, Disruption Creates

Susan K Bradley, CFP, CeFT®, Founder, Sudden Money Institute

The nature of change is to disrupt norms, and within powerful disruption is an equally powerful creative force. How we see and work with this creative potential determines what comes next.

The human experience of change is inherently nonlinear and discontinuous, thus requiring a blend of technical expertise and intuitive skills that come with experience rather than analysis.

Blind spot bias is an unseen barrier that limits our use of universal principles of change to guide each individual client to safety and clarity. Attention to our own biases and those of clients tends to make the transition experience less of a burden and more of an exploration of possibilities.

This period of disruptive change is an ideal time to strengthen the skills of a thinking partner—an intuitive blend of technical expertise and human insight. Now more than ever, we are called to develop our own habits and repeatable processes to show up as steady, thoughtful partners amid today's turbulence and in the transformational liminal space that lies ahead.

MAIN STAGE SPEAKERS

FRED TALKS

Wednesday, July 30th
8:30am-10:00am

Creating the Conditions for Generative Family Meetings: Strategies to Set the Table

Charles Eckhart, PhD., Principal, Cathexis Group

Kristin Keffeler, MSM, MAPP, Chief Learning Officer, Johnson Financial Group & Principal, illumintaion360

In this short and actionable talk, we will discuss "Setting the Table" for effective family meetings, to include practical agreements to create the conditions for effective family work. Our framework will help advisors create a safe and cohesive atmosphere to foster family learning, decision making, and growth. Focused and repeatable strategies will be given to leave the audience with a simple but effective plan for connected and generative family meetings.

Wednesday, July 30th
8:30am-10:00am

An Incomplete Atlas of Qualitative Capitals

Chris Koenemann, Family Advisor & Coach, Chris Koenemann Consulting

We have built balance sheets for human capital, raised peer-to-peer for a for social capital, and constructed learning programs for intellectual capital, offering opportunities for enterprising families to talk more about people than money—or a little more about people, at least. Yet something is missing. Indeed, we have not yet fully mapped out an entire pole in our purposeful planning. We need to explore spiritual capital as well, not just as values, not merely under the forms of humility and gratitude, but as a Higher Power with unparalleled impact, one that brings profound heeling to all forms of human stagnation and liberates souls from the control of money, by raising us to and empowering us for a fully beautiful life (indeed, a divinized one).

Wednesday, July 30th
8:30am-10:00am

The Energetics of Legacy: A New Framework for Sustainable Leadership in Family Business

Anne Bauer, Founder and Family Business Coach, Legacy with Anne Bauer

In an era of accelerating change and generational transition, family business advisors are being asked to support not only continuity and capacity -- but wellbeing.

In this powerful, FRED talk, sixth-generation family business owner and holistic business coach Anne Bauer shares The Three Pillars of Legacy: a unique, energetically-informed framework that guides leaders through growth, succession, and inner transformation.

Rooted in psychology, energy work, and lived experience, this talk will give family business leaders & advisors a new lens to:

- Spot hidden energetic and relational patterns that block capacity
- Support next-gen leaders in developing clearer communication and healthier boundaries
- Understand how energetic awareness can reduce burnout and build authentic leadership presence
- Expand your toolkit beyond governance -- into the realm of emotional and energetic sustainability

This is legacy work for the next era: heart-centered, skillful, and sustainable from the inside out.

FRED TALKS

Wednesday, July 30th
8:30am-10:00am

Empower Your Clients' Philanthropy: How Community Foundations Partner with Professional Advisors

Liza Hanks, JD, Director of Gift Planning, Silicon Valley Community Foundation

As a trusted advisor, you're often asked to help clients navigate not only complex financial matters but also deeply personal questions about legacy, purpose and community impact. In this FRED talk, learn how community foundations can be powerful allies in this process, offering deep local expertise, flexible philanthropic vehicles and the ability to accept a wide range of non-cash assets. There are over 800 community foundations in the United States, chances are there's one near your office.

Wednesday, July 30th
8:30am-10:00am

Love Wisdom Money - Inside the Heart and Mind of the Family Fiduciary

James "Buddy" Thomas, Jr. CFP, AEP, Chief Planning Officer, Superior Planning, LLC

Over the past 43 years I have witnessed some family leaders evolve into "family fiduciaries": those living up to both their legal responsibility for the property entrusted to them, and their moral responsibility of putting the best interests of others above their own.

This talk will focus on the challenges facing these individuals and how PPI members, as trusted advisors, are in a unique position to offer empowering guidance toward the outcomes they desire.

Attendees will learn how prioritizing love, wisdom, and money can assist their clients in making decisions that increase the likelihood of enriching their true family wealth.

The Gift of the Outlier: Facilitating Growth Through Family Tensions

Luke Jernagan, Managing Director of Family Learning, Matter Family Office, LLC

Matthew Wesley, JD, MDiv, Founder, Ascend Family Advisory

Most families have to deal with patterns of dissent and resistance and sometimes that can manifest as a family member who is perpetually "on the outs" or who is the focal point of patterns that do not promote a balanced, thriving and more mature family culture. Matt Wesley and Luke Jernagan, advisors to UHNW families with backgrounds in professional ministry, explore how family culture supports this scapegoating dynamic and how it can evolve and grow. Using client stories and the lens of having worked with spiritual communities, they will offer practical tools for helping a culture mature by growing through entrenched patterns to harness dissent to foster deeper and more enduring harmony.

Beyond Taboos: Empowering Family Enterprises to Embrace Diversity and Navigate Life's Transitions

Sandra Pollack, CFP, CLU, TEP, FEA, MFA-P, Founder and Principal, Trimaran Advisory Group Ltd.

Natalie McVeigh, Managing Director, EisnerAmper Center for Family Business Excellence

Over 80% of people will be disabled in their lifetime; some of those are chronic or terminal illnesses, neurodivergence, and/or mental health challenges. Most family advising literature is normed on a population that does not represent those individuals, nor are advisors trained to deal effectively.

Navigating the Experience of Marrying in to Wealth: How Advisors, Families, and Spouses Can Transcend Stigma

Nathan Dungan, Owner, CEO, Share Save Spend

Lindsay Hardie, PhD., Owner, CEO, Sierra Legacy Consulting

As advisors, we encounter stigma in how family members relate to each other based on roles, history, and power dynamics. Marrying into UHNW families carries a risk for stigmatizing treatment. The session will teach participants how to help their clients relate effectively with those who marry in.

A Generous Life: What We Can Learn from Peter Karoff (1937-2017) About Elevating Philanthropy and its Power to Inspire Lifelong Learning, Growth, and Change

Leslie Pine, Managing Partner, The Philanthropic Initiative (TPI)
Melinda Marble, Writer and Philanthropic Advisor
James (Jay) E. Hughes, Jr., Former Counselor-at-Law and Author
John A. Warnick, Esq., Founder, Purposeful Planning Institute

Join a discussion of A Generous Life by Peter Karoff, a pioneer of the philanthropic advisory field. We'll use this posthumous "dreamers and doers" guide in search of inspiration to elevate how we work with clients and think about our roles as advisors and leaders.

Wait a Sec, How Many People Are You Married To? Estate Planning for Blended and Polyamorous Families

Emily Bouchard, MSSW, CMC, CAP, Family Advisor, Speaker, Author, Blended Families Flourishing

Michael Blacksburg, JD, Estate & Legacy Advisor, Blacksburg Law

Join us for an insightful session on purposeful estate planning when families don't fit traditional models. Whether it's blended families, polyamorous relationships, or complex extended family dynamics, advisors must be prepared to address unique challenges in these evolving family structures. Using real-world case studies, we'll explore scenarios such as blended families struggling to finalize documents, polyamorous triads with varying testamentary wishes, and navigating estate concerns between new partners and adult children. This session will provide practical insights and foster a conversation on how to approach estate planning in today's diverse family landscape.

Enhancing the Future of Wealth: A Collaborative Approach to Family Engagement and Legacy Services in Your Practice

Mitchell Spearman, JD, Founder & Dreamer, Gifts of a Lifetime, LLC & Wealth & Legacy Advisor, Balentine LLC

Emily Balentine Barbour, CFP®, Principal, Head of Client Experience, Balentine, LLC

In this session, Family Engagement thought leader Mitchell Spearman will join Emily Balentine Barbour, 3rd generation Wealth Manager and Head of Client Experience at Balentine, LLC, to share how they have partnered to create a transformative service and culture centered around Family and Legacy. While wealth managers and clients engage daily, there's a critical gap in preparing wealth managers to handle the deeper, often challenging, conversations that matter most to families: passing on values, intentions, and legacies. Emily and Mitchell will share how their framework has transformed the client experience at Balentine and created lasting impact for clients for generations to come.

Through a collaborative and actionable approach, the presenters will explain how they've worked to make Family and Legacy an accessible and vital offering for advisors and clients across Balentine, LLC. Attendees will leave with insights and practical strategies for introducing or enhancing Family and Legacy services within their own wealth management practices, with the goal of delivering deeper impact and long-term client success.

Building Purposeful Well-Being Trusts: Opportunities for Creating Supportive Relationships and Structures in Advance

Kristin Keffeler, MSM, MAPP, Chief Learning Officer, Johnson Financial Group & Principal, illumintaion360

Dan Felix, JD, Owner, The Professional Trustee

Delaware's new Well-Being Trust statute is a groundbreaking development with implications both within and beyond the state. This session will provide a brief overview of the law and the opportunities it presents, followed by an exploration of real-world well-being examples. Participants will gain insights into the power of advance planning and learn practical strategies for engaging family clients and trustees effectively.

Lessons from the Crucible: Healing the Family System for a Regenerative Legacy

Elizabeth "Libby" Boatwright, MA, CFP, MDiv, DMin, BCC-PCHAC, Chaplain, Pastor and Certified Financial Planner

Peter W. Johnson, Jr., PFP, Principal, PWJohnson Wealth & Legacy, LLC

In a perfect world, we would consistently have the luxury of building family resilience and understanding over time, but occasionally we're called to step into family dynamics at moments of crisis. These pivotal moments can either fracture wealth transition plans or, when handled skillfully, become catalysts for transformative growth and sustainable legacy creation. This session provides a unique integration of expertise from two seasoned practitioners who have witnessed many family transformations through both personal and professional lenses. Drawing from Peter Johnson's extensive work in financial planning, Collaborative Practice Trusts & Estates, and men's work (as detailed in his book "The Little Book of Family Treasure"; Libby Boatwright's experiences as a palliative care chaplain, pastor, and author of the book, "The Last Things We Talk About"; as well as real-life examples drawn from participants' personal experiences, this session provides practical tools for professionals supporting families through critical transitions.

Parents and Their Offspring: Reconciling Dichotomies in Enterprising Families

Paul Edelman, PhD., PCC, Family Wealth Coach, Edelman and Associates

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

In enterprising families, parents face unique challenges in raising offspring who will thrive in adulthood. Several common dichotomies underlie many issues leading these families to seek assistance. We will explore ways to help parents currently struggling with these dichotomies and those dealing with the consequences of not learning to reconcile them.

Cultivating Healthy Client Decisions: A Paradigm of Relational Success

Caren Croland Yanis, Principal, Croland Consulting, LLC

Paul L. Hokemeyer, JD, PhD., Founding Principal, Drayson Mews

Fragile relationships in UHNW families often catalyze decisions counter to personal, family, and societal benefits. This session delves into methods for advisors to protect their own wellbeing and cultivate positive and collaborative decision-making relationships with clients.

Navigating Change Together: A Collaborative Approach to Intentional Wealth Spend-Down

Sofia Michelakis, JD, Philanthropic Advisor, Managing Director, Phīla Engaged Giving

Nicholas Palahnuk, CFP®, Founder and CEO, PhilanthPro

Spending down wealth for philanthropy is a complex topic that UHNW clients are increasingly engaging their advisors to talk about. What does it look like in practice? What are the key conversations that need to happen? How do advisors from various disciplines collaborate and work together towards their clients' goals? As the wealth transfer accelerates, being prepared to address this topic is central to family wellbeing. This session answers these important questions through active participatory learning. Participants will join teams representing four disciplines: wealth management, legal/estate planning, philanthropic advising, and tax planning and will work towards a common goal to facilitate an effective spend-down.

Metamorphosis: Navigating the Six Essential Transformations in Family Business Transitions

Elizabeth Ledoux, Transition Guide & CEO, The Transition Strategists

Andrea Carpenter, Transition Guide & President, The Transition Strategists

A highly interactive session exploring the six critical transformations required for successful business succession: Character & Role, Vision, Power, Relationships, Purpose, and Legacy. Through facilitated peer learning, discover how these transformations impact owners, successors, and family dynamics.

Brave New Digital World: How Can Families Navigate Wealth Together in an Evolving Cyber World?

Valerie Galinskaya, MBA, Managing Director and Head, Merrill Center for Family Wealth®
Shilpa Mirchandani, JD, LLM, Director, Merrill Center for Family Wealth®
Lauren Ogg, MA, Vice President, Learning and Content Design, Merrill Center for Family Wealth®
Charles Eckhart, PhD., Principal, Cathexis Group

Today, instead of paper bills and coins, children are equipped with sleek, colorful cards on a phone screen and seamlessly pay for online purchases via a pre-programmed 16-digit number. How can children and teens learn the value of a dollar if they have never paid with one before? How can we help young adults manage spending, saving and investing – and also have joint credit cards, access to family rideshare accounts, and information about the value of family homes and businesses at the end of a search button? The minimization of physical transactions has increased complexity for the rising generation – and wealth creator parents and grandparents – as they navigate communication, skill-building, identity development and decision-making around wealth.

Join us for an interactive session, showcasing "live" real-life client experiences and actionable insights, to discuss how to best equip families to navigate this Brave New Digital World.

Empowering Family Values: Designing the Family Enterprise with Philanthropy as a Core Dimension

Joseph Brooks, Managing Director & Co-Head of Family and Individual Services, Arabella Advisors

Betsy Erickson, Managing Director & Co-Head of Family and Individual Services, Arabella Advisors

Sara Hamilton, MBA, Founder & Family Advisor, Family Office Exchange & Co-founder, Enterprise Family Advisors

Families are adopting an enterprise model to manage complexity, build success, and empower wellbeing through shared values. This session will explore case studies and discuss how planners can help integrate family offices and philanthropy to achieve greater success and bold, value-driven goals.

Not Just Watering the Flowers: Helping Clients Cultivate Deep Roots and Create a Stronger Legacy

Karen McNeill, PhD., CAP, Founder & Principal, Verdandi & Associates

Natalie White, Founder & Principal, Natalie Legacy Portraits

It's not easy for consultants and advisors working with families to understand the decisions a client makes.What does it mean to see the 'full picture' of a client's background, and how does this affect our work to support family flourishing? Learn simple techniques to help clients discover their own motivations through family stories.

Moving Beyond Flat to Rising Gen Up…

Lori M. Coonen, CFP®, HDP™, Principal, Genacy Group

Rod Zeeb, JD, HDP™, Founder and CEO, The Heritage Institute

As professionals, we have come a long way from the Top-Down approach when working with client families. Some have termed the collaborative approach amongst generations as "Flat." However, we believe there is a new approach that has proven to be more powerful – Rising Gen Up… This approach expands capacity by empowering additional leaders within the family. It also enhances well-being by building confidence and creating mentoring opportunities that strengthen talents and skills.

RENDEZ-COMMUNITY ACTIVITIES

WEDNESDAY, JULY 30TH

Yoga

3:30pm-4:30pm

Engage your body, mind, and spirit in a rejuvenating yoga session tailored to all levels of experience. Whether you're a seasoned yogi or new to the practice, come join us to stretch, strengthen, and center yourself amidst the bustling energy of the conference.

Mutual Mentor Speed Dating

3:00pm-4:30pm

The perfect opportunity to share with, learn from, and get to know your colleagues!

Come with a great story, nugget of info, a helpful tool or resource, or anything else that makes things better in your world.

Moments that Matter

3:30pm-4:30pm

Get ready to laugh, cringe, and maybe even tear up a little.

During this Rendez-Community session, we're swapping stories—real ones. Stories about turning points, light bulb moments, and those "well... that escalated quickly" life experiences.

Our lives are made of stories, and sharing them helps us connect, reflect, and sometimes realize we're not the only ones winging it.

Come tell a tale (you've got up to 5 minutes!) or just sit back and enjoy the ride as your brave, wise, and occasionally awkward colleagues step up to the mic.

It's storytelling time. Let's make it memorable.

PRE/POST RENDEZVOUS ACTIVITIES

White Water Rafting

Monday, July 28th | 7:00am-4:00pm

We're excited to bring back the White Water Rafting trip for 2025!
Kick off your Rendezvous experience with an unforgettable adventure. We'll leave from the Westin as a group and head to the Colorado Adventure Center for an intermediate-level rafting trip, followed by a scenic drive to Eldorado Canyon State Park for a relaxing picnic lunch. Enjoy a peaceful setting by a shallow, slow-moving stream—perfect for cooling off, dangling your feet, or just unwinding with friends.

Logistics: We'll depart early Monday morning from the Westin (Rendezvous host hotel). We intend to return in time for the Welcome Reception.

Cost Estimate: $175-$200 per person (no profit being made – just covering cost)
Space is limited! To reserve your spot, email Jeff Savlov at jsavlov@blumandsavlov.com. He'll share more details soon.

Note: This excursion is not an official Purposeful Planning Institute event but an informal, self-organized gathering of attendees looking for a fun pre-conference experience.

Volunteering

Monday, July 28th | 8:00am - 3:30pm

Are you passionate about building community and sharing your time and talent through volunteering? Do you love coffee? If you answered "yes," this is for you! Join us for coffee and volunteering with Work Options in Denver, where we'll support individuals in building essential skills for future employment.

Spots are limited to 20 participants—secure yours today!

Pickleball

Monday, July 28th | 1:00pm - 4:00pm

Love Pickleball? Like Pickleball? Pickleball Curious?

Join us for a fun afternoon at the nearby Pickleball Food Pub on Monday, July 28th, from 11:30 AM – 3:30 PM MT. No experience? No problem! We'll have instructors on hand to get everyone started, and our fun switch-around format ensures you'll get to play with a variety of partners.

There is a $60 registration fee to cover one hour of instruction, court fees, and rentals.

Relational Leadership Equine Experience for Family Business Practitioners

Thursday, July 31st | 2:00pm-5:00pm

Join Gestalt Equine Therapist Duey Freeman and Executive Team Coach Michelle Claffey for a 3-hour experiential equine workshop on Relational Leadership Dynamics. At Duey's ranch on Lookout Mountain in Golden, Colorado, you will learn critical skills for improving relational connections and leadership in your business, team, and family by connecting with yourself, each other, and horses.

This relational equine-assisted approach is transformational and could be for you and for your client families willing to embark on this developmental journey to boost how they work together and propel their business and mission forward. Experience it for yourself! Space is limited to 12 participants.

No horse experience required. Groundwork only. No Riding.

PRE/POST RENDEZVOUS ACTIVITIES

Nature Hike

Thursday, July 31st| 2:00pm-5:00pm

Lace up your hiking boots and get ready to explore the breathtaking trails just outside Boulder!

With stunning views, fresh mountain air, and the chance to spot some local wildlife, this hike should be great. Whether you're a seasoned hiker or just looking for a scenic stroll, the trails offer something for everyone.

Heads up: Mother Nature likes to keep us on our toes, so we'll keep an eye on air quality and weather conditions to ensure a safe and enjoyable adventure. After all, the mountains are best enjoyed with clear skies and happy hikers!

So grab your water bottle, pack your sense of wonder, and let's hit the trails for an unforgettable afternoon in the great outdoors!

Denver Botanical Garden Tour

Thursday, July 31st| 2:00pm-5:00pm

Spend a serene afternoon surrounded by the natural beauty of the Denver Botanical Gardens. Wander through lush landscapes, vibrant flower displays, and tranquil water features as you explore the diverse plant collections from around the world. Whether you're a gardening enthusiast or simply looking for a peaceful escape, the gardens offer a perfect blend of inspiration and relaxation.

It's the perfect way to relax after Rendezvous, deepen connections, forge new friendships, and enjoy the beauty of the outdoors.

We will meet at the Westin and travel to the Denver Botanic Gardens as a group (approximately 30 minutes). Attendees will pay on their own (entrance fees are approximately $16 per person).

Please RSVP so we can plan our transportation accordingly.

Denver Art Museum Tour

Thursday, July 31st| 2:00pm-5:00pm

Join us for an afternoon of discovery at the Denver Art Museum, where art and inspiration come alive. From contemporary works to historical treasures, the museum's diverse collections offer something for everyone. Stroll through stunning galleries, admire unique exhibits, and take in the creativity that fills every corner.

Whether you're an art enthusiast or simply curious, this visit is the perfect way to enjoy great company and spark meaningful conversations.

We will meet at the Westin and travel to the the Denver Art Museum as a group (approximately 30 minutes). Attendees will pay on their own (general admission is approximately $30 per person).

Please RSVP so we can plan our transportation accordingly.

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 ($249 per night; hotel link provided upon registration).

Book your room for Rendezvous 2025

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), refunds after June 1st may be given less a $100 per registration processing fee.

REGISTRATION DETAILS

Visit https://purposefulplanninginstitute.com/webinars-event/rendezvous/ for pricing, registration information, and special offers.

IMPACT ROOM

Step into The Impact Room, a peaceful sanctuary for attendees seeking solace from the busting energy of the conference. Here, you will leave behind the chatter and your technology as you immerse yourself in stillness and quiet, finding rejuvenation without sacrificing community. As you take a moment to recharge, you'll also have the opportunity to impact someone in need in various ways. Come and go as you please.

NEWCOMERS RECEPTION

Monday, July 28th | 4:45pm - 5:30pm

Welcome! You Belong Here!

If this is your first time attending Rendezvous, or if you've just recently joined the PPI community, this reception is for you!

Connect with fellow newcomers and seasoned members who are passionate about fostering a welcoming community.

Through a purposeful activity designed to spark conversation and cultivate meaningful connections, you'll leave with new friendships and an interactive experience you can bring into your professional work.

While this is a special gathering just for newcomers, we invite you to stay for the Welcome Reception at 5:30 PM, where all attendees will come together for refreshments and hors d'oeuvres in the Westminster Foyer.

It's the perfect way to ease into the conference, meet new people, and start your Rendezvous experience on a high note!

WELCOME RECEPTION

Monday, July 28th | 5:30pm - 7:30pm

Kick off Rendezvous 2025 at our Welcome Reception, where all attendees are invited to gather for an evening of connection and conversation. Enjoy refreshments and hors d'oeuvres as you reconnect with familiar faces and meet new members of the PPI community.

If you're arriving on Monday, this is the perfect opportunity to settle in, start meaningful conversations, and set the tone for an engaging and inspiring Rendezvous experience.

We look forward to seeing you there!

PPI Community Banquet Dinner

Monday, July 30th | 6:30pm - 8:00pm

Join us for the PPI Community Banquet Dinner on Wednesday, July 31st, at 6:30 PM at the Westin. This special gathering is included for all registered attendees—no reservations required. Suggested attire is smart casual.

OPEN MIC & SING-ALONG

In a long-standing Rendezvous tradition, we will be hosting informal drop-in Open Mic and Sing-Along on Tuesday, July 29th and Wednesday, July 30th. These will be informal gatherings starting around 8:30pm. 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.

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