14TH ANNUAL

RENDEZVOUS

Cultivating Humanity:

Flourishing in a Complex World

JULY 20-23
BOULDER, CO

Purposeful Planning Institute

In 2026, the 14th annual in-person gathering for PPI members and guests will be held at the Limelight hotel in Boulder, CO. 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.

RENDEZVOUS TOPICS INCLUDE:

- **Family Dynamics & Culture**
- **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

Nathan Dungan, Founder & President, Share Save Spend®

Melissa Mitchell-Blitch, PCC, Founder, Eredita Consulting

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

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

Amanda Koplin, LPC, CEO, Koplin Consulting

Kaley Hudson, Vice President, Governance & Education, AlTi Global

Wisdom Expedition

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

Michele Mikeska Jaffe, PsyD, Relationships & Wealth Psychologist

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

Joseph Kuo, Partner, Financial Life Focus, LLC

Justin Breitfelder, Principal, Institutional Communications Strategist, Breitfelder GSP

Mark Greer, Philanthropic Advisor, Phīla Engaged Giving

Experience Expedition

Kaley Hudson, Vice President, Governance & Education, AlTi Global

Amanda Koplin, LPC, CEO, Koplin Consulting

Jamie Polanco, President, Polanco Consulting and Coaching

Meghan Lynch, CEO & Strategic Partner, Six-Point Strategy

Alex Neckles, Managing Director, Strategy, Anonymous Philanthropy LLC

Michael Palumbos, Family Wealth Advisor, Family Wealth & Legacy, LLC

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LAUNCHED Learning

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Event Schedule

Monday, July 20th *All times listed are in Mountain Time (MT)*		
Time	**Session Title**	**Speaker(s)**
9:00am - 4:00pm	Pre-Rendezvous Activities	
4:00pm - 7:30pm	Registration	
4:30pm - 5:30pm	Newcomers Reception	
5:30pm - 7:30pm	Welcome Reception	

Tuesday, July 21st *All times listed are in Mountain Time (MT)*		
Time	**Session Title**	**Speaker(s)**
6:30am - 8:00am	Registration	
6:00am - 6:45am	Sunrise Yoga	
7:00am - 5:00pm	PPI Resource Library	
7:00am - 7:50am	Breakfast & Optional Roundtable Discussions	
8:00am - 9:30am	Opening Keynote: Purposeful Facilitation: A Pathway to Unlock Family Flourishing	Jon Berghoff
9:30am - 10:15am	Break	
10:15am - 11:30am	**Breakout Sessions**	
	From Silos to Synthesis: Designing Family Office Systems for Integrated Advice	Kirby Rosplock, Brandy Wilson
	Learning With, From, and For Each Other	Nathan Dungan, Jeff Strese
	Flourishing Under Pressure: How to Apply the DARK–FAR Continuum to Decision-Making, AI, and Consulting	Yvonne Kinney, Doug Gray
	Conversations that Count	Stuart Burden, Anne Black
11:30am - 1:00pm	Lunch & Optional Roundtable Discussions	
1:00pm - 3:00pm	Purposeful Facilitation: A Pathway to Unlock Family Flourishing	Jon Berghoff
3:00pm - 3:45pm	Break	
3:45pm - 5:00pm	**Breakout Sessions**	
	Life, Legacy and Leadership: Preparing for the Enterprise Leader's Disability or Death	Kim Heyman, Megan Helzner
	Hope Is Not a Strategy: How Proactive Philanthropic Planning Protects Family Legacy and Community Well-being	Erica Mirich, Becky MacDonald, Diaz Dixon
	The Transition Trap: How Identity Crises Undermine Succession & Governance	Perry Gladstone, Jacob Mattox
	The Logic of Inaction: Making Sense of Client Resistance and Helping Them Take Action	Melissa Mitchell-Blitch, Cathy Carroll
6:00pm - 8:00pm	Dinner Groups (Optional)	
8:30pm - 10:00pm	Open Mic & Sing-Along (Optional / Drop-In)	

Wednesday, July 22nd *All times listed are in Mountain Time (MT)*		
Time	**Session Title**	**Speaker(s)**
6:00am - 6:45am	Sunrise Walkshops	
7:00am - 5:00pm	PPI Resource Library	
7:00am - 7:50am	Breakfast & Optional Roundtable Discussions	
8:00am - 10:00am	PPI Fellows Forum	
10:00am - 10:30am	Break	
10:30am - 11:45am	**Breakout Sessions**	
	Cultivating Humanity in Crisis: A Gamified Simulation of Family Wealth and Mental Health	Michael Spear, Gary Shunk, Effie Goldberg, Amanda Koplin
	Embracing Tension as Data, Not Disruption: Designing Effective Family Meetings	Valerie Galinskaya, Daniel Frosh, Shilpa Mirchandani, Kathy Houlb
	Toward a Family-Centric Approach to Elder Care and Later Life Decision-Making	Lisa Nam, Emily Sharpe
	A Framework for Willing the Good of the Other	Janell Turner, Chris Koenemann
11:45am - 1:00pm	Lunch & Optional Roundtable Discussions	
1:00pm - 2:15pm	**Breakout Sessions**	
	The Gift of the Outlier: Facilitating Growth Through Family Tensions	Luke Jernagan, Matt Wesley, Lindsay Hardie
	Sifting through the SQUISHY	Sandi Bragar, Shannon Hagedorn
	Cultivating Resilience in a World of Abundance: Advisor Collaboration to Foster Flourishing Futures	Kate Barnwell, Kim Llumiquinga
	Collaborating Competently around Client Purpose and Social Impact	Tony Macklin, Marguerite Griffin, Daniel Felix
2:15pm - 3:00pm	Break	
3:00pm - 4:30pm	**Rendez-Community (Variety of Educational and Somatic Events)**	
	Mutual Mentoring	
	Storytelling Lab	
	Expanding Impact Through Facilitation: Introduction to The xchange Approach	
6:00pm - 7:00pm	Cocktails and Connection	
7:00pm - 8:30pm	PPI Community Banquet	
8:30pm - 10:00pm	Open Mic & Sing-Along (Optional / Drop-In)	

Thursday, July 23rd **All times listed are in Mountain Time (MT)*		
Time	**Session Title**	**Speaker(s)**
7:00am - 5:00pm	PPI Resource Library	
7:00am - 7:50am	Breakfast & Optional Roundtable Discussions	
8:00am - 8:30am	PPI Update, Q&A	
8:30am - 10:00am	**FRED (Frank, Relevant, Educational and Dynamic) Talks**	
	Preparing Emerging Adults for a Lifetime of Transitions: How to Build Agency, Momentum, and Well-Being in a Pressure-Driven World	Ellen B. Bailey
	Breaking Moments: A New Perspective on Opportunity	James Weiner
	Living Within the Plan: Painting a New Landscape Generation by Generation	Josh Kanter
	Trust, Relevance, and Transferability: The Generational Continuity Model	Meghan Lynch
	What Dozens of Interviews with Mothers of Wealth Teach Us About Flourishing Families	Sue Schwartzman, Elaine Gast Fawcett
10:00am - 10:45am	Break	
10:45am - 12:30pm	Closing Keynote: Carrying It Forward	
12:30pm - 1:30pm	Lunch	
2:00pm - 8:00pm	Post-Rendezvous Activities	

MAINSTAGE SESSIONS

Purposeful Facilitation: A Pathway to Unlock Family Flourishing

Tuesday, July 21st | Part One: 8:00am – 9:30am
Part Two: 1:15pm – 3:00pm

Jon Berghoff, Founder & CEO, xchange

Many advisors understand that expertise alone is no longer enough. As the needs of organizations, family offices, and multi-generational systems grow more complex, the ability to facilitate meaningful conversations across the generations is a major differentiator.

That's why we're excited to bring you an immersive experience in the art and science of facilitation, led by one of the most sought-after facilitation teachers in the world, Jon Berghoff, Founder of xchange.

This is about expanding your capacity to help clients navigate bigger challenges, unlock deeper clarity, strengthen trust, and move important conversations forward.

Through this two-part experience, you'll discover how powerful questions and well-designed conversations can elevate the value you bring, deepen your impact, and set you apart in a crowded field.

You'll leave with practical tools, greater confidence, and a bigger vision for what's possible in the work you do, helping families flourish and optimize their wellbeing.

PPI Fellows Forum

Wednesday, July 22nd | 8:00am – 10:00am

The Fellows Forum brings together a distinguished group of PPI Fellows for a dynamic main stage conversation aligned with this year's theme, Cultivating Humanity: Flourishing in a Complex World.

As thought leaders and industry innovators, PPI Fellows have been instrumental in shaping and advancing the Purposeful Planning landscape, pushing beyond traditional models to foster deeper meaning, connection, and impact in their work.

In this session, Fellows will share practical wisdom drawn from their experience at the forefront of the field, offering insights, perspectives, and real-world applications that address the growing complexity facing advisors and the families they serve.

Join us for one of Rendezvous' most impactful and thought-provoking conversations where insight meets experience, and ideas turn into action.

Closing Keynote: Carrying It Forward

Thursday, July 23rd | 10:45am – 12:30pm

Don't rush out early - this year's closing session is designed to be a true capstone to your Rendezvous experience.

We'll gather for a dynamic and thought-provoking session featuring special guests (to be announced soon) who will help bring the theme of Cultivating Humanity: Flourishing in a Complex World into sharp, practical focus. This is not just a reflection on what you've heard, it's where it all comes together.

Together, we'll explore what it really means to move beyond structural success and toward human flourishing in the families we serve. We'll place special emphasis on equipping you with meaningful ways to stay connected to the ideas, to your continued growth, and to this community long after Rendezvous comes to a close.

Come for the inspiration. Stay for the integration. Leave with what matters most.

FRED TALKS

Frank, Relevant, Educational and Dynamic

Thursday, July 23rd | 8:30am – 10:00am

Breaking Moments: A New Perspective on Opportunity

James Weiner, PhD, CFBA, CFWA, Co-founder, Inheriting Wisdom

Breaking Moments, disrupters, in our lives, are not something one necessarily seeks. You often won't recognize until later that these moments are like gifts that herald the next step in your quest and bring forth life. Breaks in life are common and easy to spot amongst rising gen as they begin. their quest to gain a voice and establish their own sense of legitimacy.

Across one's life span most of us experience multiple breaks. Some are so life altering that we consider them traumatic. Silence is one response...often leading to secrets. For those who recognize the opportunity that breaks create to learn on our quest through life, a sense of legitimacy is the reward. Many of the thought leaders in the field of psychology have begun to reflect on the impact of traumatic times in their lives. By normalizing breaks, marriage, illness, death, etc. we shift the focus from trauma to fortitude. Particularly at dark times in history and in life, the perspective colors the chance to flourish.

Living Within the Plan: Painting a New Landscape Generation by Generation

Josh Kanter, JD, Founder & CEO, leafplanner & Principal at Josh Kanter Wealth Advisory Services

Recent research suggests that multi-generational families struggle to live within the plan as created by prior generations. This FRED Talk will focus on the story of the Kanter family and their ability to successfully live within the plan, despite its complexity, and why Josh Kanter thinks that is the case. Josh will focus on the few key elements of his family's estate planning that he believes not only has made them successful, but allows, as he sees it, each generation to paint the landscape that they want to paint.

Preparing Emerging Adults for a Lifetime of Transitions: How to Build Agency, Momentum, and Well-Being in a Pressure-Driven World

Ellen B. Bailey, CPWA, Head of Advisor Development, Morgan Stanley Wealth Management

Emerging adults are entering a world defined by continuous transition, yet few are taught how to navigate the choices that shape identity, purpose, and wellbeing. Families of wealth and their advisors increasingly recognize this gap as young adults struggle to convert opportunity into direction, self-trust, and momentum. Today's rising generation faces performance, identity, and existential pressures that can leave them anxious or unsure of who they are becoming. My mother's death offered a vivid example of a transition navigated with clarity, acceptance, and joy. After a major transition in my life, I wondered how I could help my children develop this capacity as they grew into their identity and direction, not only in moments of crisis. Drawing on 25 years advising UHNW families and studying transition and family systems, I want to help the next generation build agency, coherence, resilience, and compounding momentum to support fulfillment and enable success as they define it.

Trust, Relevance, and Transferability: The Generational Continuity Model

Meghan Lynch, CEO & Strategic Advisor, Six-Point Strategy

"Everything's fine." These two words are sometimes the first sign that something isn't. Strong financials, family harmony, and good governance are not enough if the conditions that created a family enterprise's momentum are no longer being replenished.

In this session, Meghan Lynch introduces the Generational Continuity Model, a diagnostic framework that determines whether a family enterprise is truly thriving or simply coasting, and why that distinction is a human capacity challenge, not a technical one. Advisors will leave with a new lens for identifying hidden fragility in their healthiest clients, and a way to intervene before the window closes.

What Dozens of Interviews with Mothers of Wealth Teach Us About Flourishing Families

Sue Schwartzman, MA, CAP, 21/64 Trainer, Author, Founder, Schwartzman Advising

Elaine Gast Fawcett, MS, 21/64 Trainer, certified Story Facilitator, Author, Founder, PhilanthroComm

"I'm surrounded by experts—but no one has ever asked how this is changing me as a parent."

By 2030, women will control nearly 40% of global wealth. Many of them are mothers—often first-generation wealth holders—raising children without inherited emotional maps for how money changes family life.

In our Women Parenting with Wealth study, we interviewed dozens of high- and ultra-high-net-worth moms to hear their voices directly. These mothers are quietly holding the emotional center of their families—navigating guilt and gratitude, protection and preparation, truth and timing—often without language or tools to do so.

How can our field better support them?

BREAKOUT SESSIONS

Collaborating Competently around Client Purpose and Social Impact

Tony Macklin, CAP®, Principal, Tony Macklin Consulting

Marguerite H. Griffin, JD, CAP®, IPA, 21/64 Certified Advisor, Senior Vice President & Director, Philanthropic Advisory Services, Northern Trust

Daniel P. Felix, JD, Principal, The Professional Trustee

Today's most effective advisors must move beyond technical expertise to collaborate across disciplines in service of client purpose. As families grow more complex – shaped by diverse cultures, values, and money stories – the need for integrated, human-centered advising becomes essential.

This session explores how advisors can intentionally build, align, and leverage complementary competencies to support meaningful client outcomes.

Through guided self-reflection, peer dialogue, and a multi-cultural family case study, participants will apply PPI's Purposeful Pillars and Daylight's Philanthropic Advising Competency Model to clarify their roles, strengthen collaboration, and enhance their ability to serve purpose-driven, socially engaged families.

Content Areas: Collaboration & Team Building Practices | Professional Intrapersonal Development and Skill Building

Level: Intermediate

Conversations that Count

Stuart Burden, Executive Director, Family Engagement and Governance, J.P. Morgan Wealth Management

Anne Black, MBA, Managing Director, J.P. Morgan Wealth Management

Effective communication is essential for nurturing family prosperity across generations. Yet many families struggle to discuss the impact of wealth — uncertain about how to broach the topic, when to initiate conversations, or how to navigate different communication styles within the family.

This session will share findings from a multigenerational research report on wealth conversations, which will be available to all participants. It offers fresh perspectives and practical guidance to help families build and preserve their legacies. Participants will also engage in dynamic, experiential communication exercises — translating research findings into action — that can be applied directly with families and groups.

Content Areas: Family Dynamics, Systems Theory, and Relationships | Relationships, Individual Development Across the Lifespan

Level: Intermediate

Cultivating Humanity in Crisis: A Gamified Simulation of Family Wealth and Mental Health

Michael Spear, CFP®, Financial Counselor, GamFin

Gary Shunk, Founder & Principal, Aligned Family, LLC

Effie Goldberg, Founder & CEO, Ascend Healthcare

Amanda Koplin, LPC, CEO, Koplin Consulting

What happens when a wealth builder or an inheritor's life veers off course and your estate plan and trust document suddenly becomes the frontline response plan? Step into a fast-paced simulation where you serve as a team of advisors through decades of mental illness, relapse, recovery, and family tension. Your table will confront real-time curveballs challenging judgment, discretion, and compassion. This is not a lecture — it's a strategy lab. Collaborate across disciplines, test protective provisions under pressure, and learn how to design estate plans that remain effective when families are at their most vulnerable and when your decisions matter most.

Content Areas: Family Dynamics, Systems Theory, and Relationships | Family Stories, History, and Culture | Individual Development Across the Lifespan

Level: Intermediate

Cultivating Resilience in a World of Abundance: Advisor Collaboration to Foster Flourishing Futures

Kate Barnwell, Consultant, The Family Business Consulting Group, Inc

Kim Llumiquinga, CAP®, Director of Legacy and Learning, TFO Family Office Partners

Material wealth often deprives rising gen the experience of adversity and limits opportunities to develop resilience. Join us for an interactive session about guiding rising-gens to build resilience and move from cushioning to capability. Kim will present the Pillars of Resilience framework she developed during her decades of work with affluent families and share practical tools for fostering resilience in rising gen. Kate will facilitate your participation in small group role-play to apply learning in a simulated client family interaction. We'll conclude with a large group discussion to activate our collective wisdom and generate strategies to use in practice.

Content Areas: Individual Development Across the Lifespan

Level: Intermediate

Embracing Tension as Data, Not Disruption: Designing Effective Family Meetings

Valerie Galinskaya, MBA, Managing Director & Head, Merrill Center for Family Wealth®

Dan Frosh, JD, ACFBA, CFWA, Director, Center for Family Wealth Principal, Merrill Center for Family Wealth®

Shilpa Mirchandani, JD, LLM, Director, Center for Family Wealth Principal, Merrill Center for Family Wealth®

Kathy Holub, JD, Founder & Principal, Holub Consulting, LLC

Most enterprising families struggle with internal tension, and it's often the reason they turn to advisors for help. While the natural instinct for the family – and advisor – may be to resolve the presenting tension quickly, tension can offer powerful insights into underlying family dynamics and priorities. This session will reframe tension as valuable data rather than disruption, equipping advisors with strategies to uncover the sources of family tension, determine whether a family is ready to engage in a productive family meeting and design a forum for meaningful discussion.

Content Areas: Family Dynamics, Systems Theory, and Relationships

Level: Intermediate

Flourishing Under Pressure: How to Apply the DARK–FAR Continuum to Decision-Making, AI, and Consulting

Yvonne Kinney, PhD, Principal, Consulting Solutions, LLC

Doug Gray, PhD, CEO, Action Learning Associates

Families and enterprises today are navigating unprecedented complexity, emotionally, relationally, and cognitively. Under pressure, best intentions can be distorted by assumptions and restrictive thinking.

This interactive breakout introduces the DARK–FAR Continuum. This practical framework grounded in positive psychology and appraisal theory, is called the Seligman Proof of First Principle for decision making that includes AI mediated appraisal. Participants will recognize when Distortion-Augmented Reality Knowing (DARK) thinking restricts our capacity to shift toward Flourishing-Augmented Reasoning (FAR) thinking. The outcome is intentional decision-making that accelerates flourishing behaviors for clients and advisors.

Through guided reflection, small-group dialogue, and real-world caselets, participants will identify behavioral triggers, interrupt distortion, and cultivate discernment. This session develops uniquely human capacities for wisdom, clarity, and meaning-making that support flourishing in complex systems.

Content Areas: Family Dynamics, Systems Theory, and Relationships

Level: Intermediate

A Framework for Willing the Good of the Other

Janell Turner, CAP®, Managing Director, Phila Engaged Giving

Chris Koenemann, Consultant, Continuity Family Business Group

Janell Turner and Chris Koenemann co-facilitated a family retreat grounded in the principle of willing the good of the other—guiding a group of siblings from deep disconnection and the brink of estrangement to renewed connection, belonging, and shared time together.

The family came in navigating layers of tension shaped by differing values, unresolved hurts, and deeply personal convictions. Drawing on a blend of relational frameworks and facilitation tools, Janell and Chris helped create the conditions for meaningful dialogue, repair, and reconnection.

Join us to hear the story and experience the tools that made this transformation possible.

Content Areas: Collaboration & Team Building Practices | Increasing the Reach of Purposeful Planning in the World

Level: Intermediate

From Silos to Synthesis: Designing Family Office Systems for Integrated Advice

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

Brandy L. Wilson, Independent Advisor to Families

Family offices often separate technical expertise from relational judgment, creating handoff risk, blurred accountability, and fragmented advice. This session introduces the Whole-Advisor / Whole-Office model, a practical framework for aligning governance, roles, and decision-making so expertise translates into clearer outcomes for families. Advisors who work in or alongside a family office will leave with a sharper diagnostic lens, integration prompts, and actionable design principles to strengthen trust, improve collaboration, and build systems where good advice can actually work.

Content Areas: Family Business | Governance and Generational Wealth Transitions

Level: Advanced

Hope Is Not a Strategy: How Proactive Philanthropic Planning Protects Family Legacy and Community Well-being

Erica Mirich, Founder & Principal, PIVOT Strategic Philanthropy

Becky MacDonald, Founder & Principal, MacDonald Wealth Associates

Diaz Dixon, Founder & Principal, Performance Driven Consulting

We enter philanthropic partnerships the way we enter any relationship: with trust, hope, and the quiet assumption that shared values will carry us through. They won't — not alone. People change. Leadership turns over. Priorities evolve. And yet in giving, we hand over hope and call it a strategy. The question too often avoided: what happens when things shift? Two real-world cases show how proactive planning protects family legacy, strengthens trust, and keeps communities whole — and why planning for change isn't pessimism. It's the kindest, most strategic thing a funder can do.

Content Areas: Philanthropy | Social Enterprises

Level: Intermediate

Learning With, From, and For Each Other

Nathan Dungan, Owner & CEO, Share Save Spend

Jeff Strese, CFWA, CFBA, Principal, Jeff Strese Consulting Group

Navigating complexity in UHNW family advisory work requires continuous learning and adaptive expertise. Through structured reflection, peer dialogue, and collaborative exchange, participants will enhance their growth mindset—discovering practical strategies to develop advanced practitioner skills while building meaningful connections with colleagues who share similar challenges and aspirations.

Content Areas: Individual Development Across the Lifespan

Level: Intermediate

Life, Legacy and Leadership: Preparing for the Enterprise Leader's Disability or Death

Kim V. Heyman, JD, LLM, AEP®, Director of Wealth Planning, Pathstone

Megan Helzner, MPA, MBA, Principal, CFAR

Advance planning for multi-generational enterprises (family business, family office, families of wealth), important as they are, can be challenging for the family and the professionals who serve them, as they involve sensitive topics – death and disability. Through interactive cases, breakout discussions, and live polls, this session will help us learn from data, best practices, and one another about the importance of planning, and the need to do so collaboratively, with humanity and emotional intelligence, and in a manner that ensures dignity.

Content Areas: Family Dynamics, Systems Theory, and Relationships | Individual Development Across the Lifespan

Level: Intermediate

Sifting through the SQUISHY

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

Shannon Hagedorn, Client Engagement Director, Bench Consulting

Purposeful advisors face squishy moments when discomfort enters client conversations. In this interactive breakout, participants apply the SQUISHY framework to real client cases, practicing how to lean into discomfort, deepen relationships, and guide conversations toward meaningful outcomes.

Content Areas: Family Business | Governance and Generational Wealth Transitions

Level: Foundational

The Gift of the Outlier: Facilitating Growth Through Family Tensions

Luke Jernagan, Managing Director, Matter Family Office, LLC

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

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

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.

Content Areas: Family Dynamics, Systems Theory, and Relationships

Level: Advanced

The Logic of Inaction: Making Sense of Client Resistance and Helping Them Take Action

Melissa Mitchell-Blitch, PCC, Founder, Eredita Consulting, LLC

Cathy Carroll, MBA, MCC, President, Legacy Onward, Inc.

If (you or) your clients fail to do what they repeatedly promise they will do, this session is for you! Learn a framework that helps surface why we don't do what we say we will do – even if we want to. The Immunity to Change process gently invites clients to discover the competing commitments that make their inaction perfectly logical. This new awareness enables new action. Of course, we will practice first on ourselves!

Content Areas: Individual Development Across the Lifespan

Level: Intermediate

The Transition Trap: How Identity Crises Undermine Succession & Governance

Perry Gladstone, Family Enterprise Transition Specialist, Perry Gladstone Consulting
Jacob Mattox, FBS, Relationship Manager, Family Office Exchange

Identity crisis undermines succession and governance. When roles change, and clarity hasn't arrived, the people stepping back, stepping up, and influencing from the sidelines destabilize everything the structure was built to hold. This session introduces a human-centred framework for developing Individual Succession Plans alongside the legal and financial ones your clients already have. You'll leave with a practical, immediately applicable approach for the gap most advisors miss — and a new way to explain to clients why the governance isn't holding.

Content Areas: Family Business | Governance and Generational Wealth Transitions
Level: Intermediate

Toward a Family-Centric Approach to Elder Care and Later Life Decision-Making

Lisa Nam, Managing Director, JP Morgan Family Engagement & Governance
Emily Sharpe, JD, Founder, Guiding Generations

Aging parents are living longer and often with better health, yet families face greater complexity, responsibility and stress in addressing their needs and managing their care. This interactive session will explore how economic, social, and generational shifts are reshaping elder care, and why many families remain stuck in reactive, crisis-driven patterns. Through real-life scenarios and small group discussions, participants will discuss barriers to meaningful family conversations and will learn more about elderhood as a developmental stage. Participants will leave with practical frameworks to design and lead effective family alignment conversations.

Content Areas: Family Dynamics, Systems Theory, and Relationships | Individual Development Across the Lifespan
Level: Intermediate

Program Level Descriptions

The **Foundational** learning pathway offers an accessible entry point to ground participants in the essential ideas, language, and frameworks for purposeful planning. While ideal for those early in their development, this level is also valuable for experienced professionals seeking structured exposure to unfamiliar areas or a refresher on key concepts. These programs create a shared starting point that enables deeper learning, stronger collaboration, and more intentional application over time.

The **Intermediate** learning pathway is designed for individuals who have foundational knowledge and are ready to deepen their understanding and application. These programs deepen insight, introduce greater complexity, and emphasize practical implementation in real-world contexts. Participants are invited to integrate new perspectives into their work, strengthening both competence and confidence as they engage more fully with clients and systems.

The **Advanced** learning pathway is designed for practitioners who are ready to lead, integrate, and evolve their practice. These programs engage complex dynamics, invite critical reflection, and emphasize the thoughtful application of expertise in nuanced situations. Participants deepen their capacity to navigate uncertainty, hold multiple perspectives, and bring greater intentionality, presence, and impact to their work.

RENDEZ-COMMUNITY

Wednesday, July 22, 2026 | 3:00pm – 4:30pm

Rendez-Community offers a variety of sessions designed to support and enhance wellbeing while strengthening the connections that make our community unique. This dedicated time creates space for shared experiences that nurture holistic wellbeing in both personal and professional life, while deepening relationships, fostering meaningful conversations, and building a stronger sense of belonging within the PPI community.

Mutual Mentor Speed Dating

A fast-paced, high-energy opportunity to connect, share, and learn from one another. Come ready to offer something meaningful—a great story, a practical insight, a helpful tool or resource, or a perspective that's made a difference in your work. You'll both give and receive, tapping into the collective wisdom of your colleagues in a dynamic, engaging format. It's a simple idea: everyone has something to teach, and everyone has something to learn.

Storytelling Lab

Back by popular demand! 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, lightbulb 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 five 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.

Expanding Impact Through Facilitation: Introduction to The xchange Approach

If the Day 1 experiences led by xchange shifted how you think about engagement, conversation, or the role you play in designing and facilitating conversations with clients, this optional workshop is an opportunity to go further. During this interactive 90-minute session, you'll explore The xchange Approach and gain practical insights to design more engaging, insight-rich conversations in your work. You'll also learn more about the xchange Guide Certification Program and what becomes possible as you develop these capabilities more fully. Join us to build new skills and elevate the impact of the conversations you lead.

RENDEZ-SOCIAL

From opening receptions to late-night sing-alongs, Rendez-Social is where the connections, conversations, and memories of Rendezvous come to life beyond the sessions.

Rendezvous First Time Attendee Connect & Kickoff

Monday, July 20, 2026 | 4:30pm – 5:30pm

New to Rendezvous or looking to feel connected from the start? This welcoming kickoff is designed to help you quickly feel at home in the PPI community. Get to know the people, the mission, and the purpose of PPI right away through insights from founding members and opportunities to connect with fellow participants. You'll leave with new relationships already forming, and a strong sense of belonging before Rendezvous even begins.

Note: This is a dedicated experience for newer and first-time attendees and those who enjoy welcoming them, held in advance of the larger welcome reception.

Welcome Reception

Monday, July 20, 2026 | 5:30pm – 7:30pm

Kick off Rendezvous the right way! The Welcome Reception invites all attendees to gather for an evening of connection, conversation, and community — a chance to ease into the experience before the sessions begin.

Enjoy refreshments and hors d'oeuvres as you reconnect with familiar faces and meet new members of the PPI community. Whether you are a longtime member or joining us for the first time, this is the moment to settle in, spark a great conversation, and let the energy of the week ahead take hold.

We look forward to seeing you there!

Sunrise Yoga

Tuesday, July 21, 2026 | 6:00am – 6:45am

Start your morning with intention. Sunrise Yoga is a gentle way to ease into the day, clear your mind, and connect with fellow attendees before the sessions begin. Join us on Tuesday, July 21 at 6:00am for a 45-minute practice designed for all levels. No experience necessary. Just show up, breathe in the Colorado morning air, and set the tone for a great day ahead.

Small Group Dinners

Tuesday, July 21, 2026 | 6:30pm – 8:00pm

On Tuesday, July 21, we'll be hosting small group dinners at various locations. You'll be added to a small group to dine together at a location selected by your designated host (pay-on-your-own). It's a relaxed and memorable way to connect with like-hearted, like-minded professionals and deepen your Rendezvous experience.

This is a fantastic opportunity to build relationships with like-hearted, like-minded professionals while enhancing your learning and collaborative experience at Rendezvous.

Sign Up for a Small Group Dinner Experience

Sunrise Walkshops

Wednesday, July 22, 2026 | 6:00am – 6:45am

New this year, our Sunrise Walkshops invite you to start your morning with fresh air and great conversation. Small groups will gather for a lightly guided 45-minute walk through the trails and neighborhoods around the hotel, with conversation flowing naturally around a pre-selected topic connected to the themes of Rendezvous. Come with comfortable shoes and your curiosity. The best ideas often show up when you are moving.

Cocktails and Connection

Wednesday, July 22, 2026 | 6:00pm – 7:00pm

The evening begins with intention. This pre-banquet reception is designed to spark great conversation and set the tone for an inspiring night ahead. Enjoy a curated menu of purposeful-themed mocktails crafted to reflect the themes at the heart of our community. Come for the mocktails. Stay for the conversation.

PPI Community Banquet

Wednesday, July 22, 2026 | 7:00pm – 8:30pm

Join us on Wednesday, July 22 at 7:00pm as we come together to celebrate the connections, conversations, and shared commitments that make this community so extraordinary. This gathering is included for all registered attendees and no reservations are required. Smart casual attire is suggested. This is our night to pause, reflect, and celebrate the community we have built together.

Bringing a guest? Additional tickets for non-registered guests are available for purchase. Purchase Additional Tickets Here

Open Mic & Sing-Along (Optional / Drop-In)

Tuesday, July 21 & Wednesday, July 22, 2026 | 8:30pm – 10:00pm

A Rendezvous tradition returns. The Open Mic and Sing-Along is one of those evenings that is hard to describe and even harder to forget. Join us on Tuesday, July 21 and Wednesday, July 22 starting at 8:30pm for an informal, drop-in gathering where the only agenda is good music and great company.

Two acoustic guitars and hand percussion will be provided, and you are more than welcome to bring your own instrument. Whether you are a seasoned performer or simply there to clap along and soak it in, there is a place for you here.

PPI Resource Library & Lounge

Tuesday, July 21 – Thursday, July 23, 2026

The PPI Resource Library & Lounge is designed as a welcoming place to pause, connect, and explore. Throughout Rendezvous, attendees are invited to stop in, enjoy a cup of coffee or tea, and spend time with colleagues in a relaxed, informal setting. This space also serves as a curated collection of ideas and inspiration from across our community.

Browse a wide range of resources—including tools, white papers, publications, and books—generously shared by fellow members and thought leaders in the field.

PRE-RENDEZVOUS ACTIVITIES

Monday July 20, 2026

Volunteering

9:30am – 3:00pm

Kick off the conference with energy, connection, and impact! Join us for a pre-conference volunteer experience — a chance to do something meaningful before the sessions even begin. We'll start the morning with coffee and great conversation at a nearby café,then head out together to serve the local community. It's the perfect way to meet inspiring people early, build real connections, and arrive at the conference already part of something bigger. Come for the coffee, stay for the camaraderie, and leave knowing you made a difference.

Spots are limited so Secure Your Spot now!

Boulder E-Bike Tour

12:30pm – 3:30pm

Get ready to see Boulder from the saddle. This E-Bike Tour is a guided half-day adventure through some of Colorado's most stunning scenery, covering 14 miles along quiet roads, bike paths, and the breathtaking trails of Boulder & Chautauqua Park.

Premium e-bikes and helmets are provided, making the ride accessible for all fitness levels regardless of experience. This is the perfect way to experience the natural beauty and local charm of Boulder before Rendezvous kicks off. The cost is $175 per person. The meeting place is approximately a 35-minute walk from the hotel — join us in the Limelight Hotel lobby at 11:45am to walk together, or at 12:15pm if you prefer to grab an Uber.

Space is limited, so Secure Your Spot early!

Group Cooking Experience: Where Cooking Connects Us

10:30am – 3:00pm

Get ready to cook your own lunch. Join us Monday at 10:30 to grab coffee and head over to our class to work as a team cooking our own lunch. It will be the perfect time to either show off your amazing cooking skills or learn new ones. Either way we will laugh, chat, and cook the afternoon away.

Cost and payment process coming soon. You don't want to miss out on this and space is limited. Secure your Spot!

POST-RENDEZVOUS ACTIVITIES

Thursday, July 23, 2026

Nature Hike

2:00pm – 5:00pm

Make the most of your remaining time in beautiful Boulder, CO with a moderate hike through the Chautauqua Park trails. The group will leave from the hotel after lunch. Once at the trailhead, there will be multiple trails to choose from. Be sure to bring water, a snack, and all of your enthusiasm! Your group leader will coordinate the logistics (i.e. transportation, timing, etc).

RSVP here!

Boulder Museum of Contemporary Art Tour

2:00pm – 4:00pm

Enjoy a few more hours with your Rendezvous colleagues as we explore the Boulder Museum of Contemporary Art. This museum is a catalyst for creative expression offering innovative exhibitions. We will depart after lunch and walk over to the museum as a group (approximately 10 minutes). Admission fees are cited as “pay from your heart” - aka whether it’s one penny or $100, you pick your price!

We will meet at Limelight and walk over to the museum as a group (approximately 10 minutes) .

RSVP Here!

Relational Leadership Equine Experience for Family Business & Wealth Management Practitioners

2:00pm – 6:00pm

Gestalt Equine Therapist Duey Freeman and Executive Team Coach Michelle Claffey are excited to offer another experiential equine workshop for the PPI community. This relational equine-assisted approach is transformational and could be beneficial for your client families willing to embark on a developmental journey to boost how they work together and propel their business, mission, and family forward. Come experience it for yourself!

This workshop offers an embodied experience to expand your relational capacity, leadership, and presence by connecting with yourself, each other, and horses. This year, we will focus on Contact as the basic building block of Connection, Relationships, and Trust. The experience blends coaching and therapeutic approaches in a safe space co-created by the group. Your expert therapist and coach facilitators work with and guide the group through what emerges. The experience will vary based on group dynamics, participants, horses, and what occurs within Nature around us. We welcome all and invite curiosity as we share and create an embodied relational experience together.

Limited to 10 participants! **No riding involved – this is a boots-on-the-ground group experience. No riding. No prior horse experience required. Sneakers work!

Click the link to learn more and register today https://www.claffeyleadership.com/2026-relational-leadership-equine

Post-Rendezvous Dinner Groups

7:00pm – 9:00pm

Staying overnight after Rendezvous? Join a dinner group for more fun and conversation together in Boulder. All are welcome! Let's keep our connections going as long as we can!

Please RSVP so we can plan our dinner groups accordingly

HOTEL RESERVATIONS

We're thrilled to host Rendezvous 2026 at the stunning Limelight Hotel in Boulder, Colorado. Nestled steps from vibrant shops, restaurants, and scenic trails, the Limelight offers the perfect blend of accessibility and serenity—an ideal backdrop for PPI's signature learning, connection, and community. We have negotiated a very favorable rate for our attendees.

Book your room for Rendezvous 2026

REGISTRATION DETAILS

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

CANCELLATION POLICY

You may cancel your registration for a full refund if requested prior to or on May 31st. After this date, refunds are subject to our discretion and will be granted only in cases of compelling reasons. We understand that unexpected circumstances may arise, and we will do our best to accommodate your needs. Please reach out to us directly to discuss any cancellation requests beyond the specified deadline.