



Purposeful Planning Institute

February 11TH-13TH

PURPOSEFUL PLANNING SYMPOSIUM 2026

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

The Purposeful Planning Symposium brings together nationally renowned faculty for unique and engaging educational and professional development opportunities that showcase the benefits of infusing best practices from the domains of relational, philanthropic, and legacy planning into the technical aspects of Estate Planning and Wealth Management.

Join us February 11-13 for practical guidance, tips, and substantive materials to elevate your estate, transition, and charitable planning conversations. All sessions will be delivered through an interactive virtual format that can be enjoyed in the comfort of your home or office while providing opportunities to connect and engage with professionals from across the country and around the world.

All presentations will be recorded and provided for attendees to access for a 60-day period. We strongly encourage you to participate live, as certain highly interactive segments will not be available in the recorded content.

REGISTRATION DETAILS

Member Rate: **\$395 (\$495 after February 1st)**

Non-Member Rate: **\$595 (\$695 after February 1st)**

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

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

CONTINUING PROFESSIONAL EDUCATION

The Purposeful Planning Symposium has been accredited for 13.5 continuing professional education credits through the CFP® Board as well as 9 live and 20 home-study continuing legal education credits through the Colorado Supreme Court Office of Continuing Legal and Judicial Education.

Wednesday, February 11th *All times listed are in Mountain Time (MT)

Start	End	Session Type	Session Title	Speaker(s)
9:00am	9:30am	Opening Remarks		John A. Warnick, Esq.
9:30am	10:30pm	Keynote	The Importance of Understanding Millennials (And Future Generations) to Creatively Structure Trusts to Prevent Family Disputes	Al W. King III , JD, LL.M., AEP (Distinguished), TEP
10:30pm	11:00pm	Break		
11:00am	12:30pm	Breakout Sessions		
			How to Help Clients Design Gumby Trusts -Maximizing Flexibility and Optionality	Kim Kamin, JD
			Charitable Giving After OBBBA: The Impact of the New Rules on Philanthropic Planning	Craig Stone, ESQ
			Partnership Tax "Hacks" (Simple Solutions to Client Conundrums)	Paul Lee, JD, LL.M. (Taxation)

Thursday, February 12th *All times listed are in Mountain Time (MT)

Start	End	Session Type	Session Title	Speaker(s)
9:00am	9:30am	Opening Remarks		John A. Warnick, Esq.
9:30am	10:30pm	Keynote	Trust Constellations: A New Beneficiary-Centered View of Trust Law	Patrick Duffey, JD, LL.M. (Taxation) Stacie Nelson, JD
10:30pm	11:00pm	Break		
11:00am	12:30pm	Breakout Sessions		
			Advisor Mental Health	Amanda Koplin, LPC Martin Shenkman, CPA, MBA, PFS, AEP, JD
			Integrated Purposeful Planning: A Case for Collaboration	Judi Cunningham, MA, FEA, ICD.D, CEPA Katherine Bright, MBA, FEA Robyn Hooper, CPA, CA
			Innovating Wealth & Philanthropy: Practical Strategies to Sustain and Grow Your Practice in a Changing Landscape	Janell Turner, CAP® Kanwar Singh, CDFA®

Friday, February 13th *All times listed are in Mountain Time (MT)

Start	End	Session Type	Session Title	Speaker(s)
9:30am	11:00pm	Breakout Sessions		
			After OBBBA: Managing the Noise Around Enhanced Tax, Estate and Charitable Planning	Griffin Bridgers , JD, LL.M. (Taxation)
			Beyond Money Scripts: Applying Internal Family Systems™ to Financial Life Planning 3.0	Richard Kahler, MS, CFP®, CFT™, CeFT®
			Transforming Trusts for Purposeful Impact	Wendy Goffe, JD Laura Mandel, JD
10:30pm	11:00pm	Break		
11:30am	12:30pm	Closing Keynote	Collaboration in the Estate and Philanthropic Planning: Engagement Between the Technical Estate Planners and the Experts in the Human Side of Planning	Leslie Dashew, MSW Natalie McVeigh, CAP, TEP, ACFBA, ACFWA

AGENDA

The Importance of Understanding Millennials (And Future Generations) to Creatively Structure Trusts to Prevent Family Disputes

Al W. King III, JD, LL.M., AEP (Distinguished), TEP, Co-Founder, Co-Chairman and Co-Chief Executive Officer, South Dakota Trust Company, LLC

Millennials and Gen-Z are rapidly becoming primary beneficiaries, trustees, and leaders in family enterprises. Their expectations for transparency, autonomy, purpose, and collaboration challenge traditional trust structures and advisory practices. This session explores how understanding rising-generation values and communication styles can inform trust design, governance, and family engagement strategies that reduce conflict and build long-term unity. Participants will learn practical approaches for aligning legal structures and advisory methodologies with the needs and motivations of the next generation.



Professional Intrapersonal Development and Skill Building



Professional Innovation & Practice Building



Intermediate Level

Trust Constellations: A New Beneficiary-Centered View of Trust Law

Patrick Duffey, JD, LL.M. (Taxation), Partner, Holland & Knight LLP

Stacie Nelson, JD, Partner, Holland & Knight LLP

Trust law has a decidedly siloed top-down view of trusts: settlors give property to trustees who hold it in trust for current beneficiaries and then for remaindermen. Simply, that view is incompatible with the modern reality of estate planning in which many interrelated trusts co-exist in an ecosystem that is designed by families to obtain the benefits of trusts while passing wealth across generations. Those trusts must interact with one another, coordinate distribution and investment strategies, and take actions designed to benefit the family as a whole. This presentation explores the ways in which current law falls short and provides practical suggestions to address those deficiencies until the law catches up with reality.



Philanthropy



Financial Advising and Wealth Planning



Intermediate Level

Collaboration in the Estate and Philanthropic Planning: Engagement Between the Technical Estate Planners and the Experts in the Human Side of Planning

Leslie Dashew, MSW, Founder & Chair, Aspen Family Business Group

Natalie McVeigh, CAP, TEP, ACFBA, ACFWA, Sr Management Consultant, Oikonomia

Join Leslie Dashew and Natalie McVeigh for an engaging conversation on bridging the human and technical dimensions of family planning. Drawing on their deep experience in family dynamics, governance, and succession, they will demonstrate how collaboration between estate planners and family systems professionals leads to more effective and enduring outcomes. Participants will explore how understanding family psychology and fostering advisor collaboration can help families achieve alignment, continuity, and success.



Financial Advising and Wealth Planning



Governance and Generational Wealth Transitions



Intermediate Level

Advisor Mental Health

Amanda Koplin, LPC, CEO, Koplin Consulting

Martin Shenkman, CPA, MBA, PFS, AEP, JD, Founder, Shenkman Law

Advisors face extreme stress, burnout, and high mental health risks. These roles demand constant vigilance, client management, and the ability to perform under high stakes — often at the expense of personal well-being. Attendees will leave with practical strategies to implement now.



Philanthropy



Governance and
Generational Wealth Transitions



Basic Level

Charitable Giving After OBBBA: The Impact of the New Rules on Philanthropic Planning

Craig Stone, ESQ, Principal & President, Stone Bybee & Associates, PLLC

This session will explore the role of Philanthropy as part of a Family's Social Capital, explain the technical and practical impact of the recent One Big Beautiful Bill Act on charitable planning, identify scenarios to recommend charitable strategies, and discuss the role of charity as legacy.



Collaboration &
Team Building Practices



Family Dynamics,
Systems Theory, and Relationships



Intermediate Level

After OBBBA: Managing the Noise Around Enhanced Tax, Estate and Charitable Planning

Griffin Bridgers, JD, LL.M. (Taxation), Independent Estate Planning, Tax, and Wealth Strategist, Attorney & Educator, Bridgers Wealth Strategies, LLC

In this session, Griffin Bridgers will present some of the key tax updates relevant to estate and charitable planning under H.R. 1 while also highlighting, through case studies and cautionary tales, some traps and pitfalls for the unwary.



Trusts, Trustees,
and Beneficiaries



Governance and
Generational Wealth Transitions



Intermediate Level

Innovating Wealth & Philanthropy: Practical Strategies to Sustain and Grow Your Practice in a Changing Landscape

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

Kanwar Singh, CDFA®, Managing Director, Private Wealth Advisor, Rockefeller Capital Management

Explore how recent policy shifts and executive orders are shaping donor priorities and advisor roles in guiding wealth and philanthropy. We'll discuss practical tools advisors can use to bridge divides, foster collaboration across generations, and guide families toward sustainable impact.



Financial Advising
and Wealth Planning



Family Business



Intermediate Level

Integrated Purposeful Planning: A Case for Collaboration

Judi Cunningham, MA, FEA, ICD.D, CEPA, Principal / Founder, Trella Advisory Group

Katherine Bright, MBA, FEA, Consultant, Trella Advisory Group

Robyn Hooper, CPA, CA, Consultant, Trella Advisory Group

Solving the complex dilemmas faced by families requires more than individual expertise—it demands collaboration. Together we can deliver integrated solutions that are both technically sound and relationally effective. Planning thrives when advisors unite their strengths to serve the family as a whole.



Family Dynamics, Systems
Theory, and Relationships



Individual Development
Across the Lifespan



Intermediate Level

How to Help Clients Design Gumby Trusts - Maximizing Flexibility and Optionality

Kim Kamin, JD, Partner and Chief Wealth Strategist, Gresham Partners, LLC

This presentation helps professional advisors who work with wealthy families consider their opportunities to influence the process of estate planning, trust creation and trust modification. In these times of uncertainty, drafting flexible trusts, building in the ability to modify, and considering how to change existing irrevocable trusts is paramount.



Trusts, Trustees,
and Beneficiaries



Governance and
Generational Wealth Transitions



Intermediate Level

Partnership Tax “Hacks” (Simple Solutions to Client Conundrums)

Paul Lee, JD, LL.M. (Taxation), Chief Tax Strategist, Northern Trust Wealth Management

An entity taxed as a partnership (or disregarded entity) is the most flexible tax planning tool for practitioners, but with that flexibility comes complexity in the form of Subchapter K of the Code.



**Governance and
Generational Wealth Transitions**



**Individual Development
Across the Lifespan**



Intermediate Level

Beyond Money Scripts: Applying Internal Family Systems™ to Financial Life Planning 3.0

Richard Kahler, MS, CFP®, CFT™, CeFT®, Founder / President, Kahler Financial Group

This workshop introduces Internal Family Systems™ as a framework for understanding clients' inner conflicts around money. Participants will explore money scripts, identify burdened parts through guided meditation, and learn how Self-led awareness fosters lasting behavioral and financial transformation.



**Trusts, Trustees,
and Beneficiaries**



**Governance and
Generational Wealth Transitions**



Basic Level

Transforming Trusts for Purposeful Impact

Wendy Goffe, JD, Partner, Ogden Murphy Wallace P.L.L.C.

Laura Mandel, JD, Chief Fiduciary Officer, The Northern Trust Company

As families increasingly seek to align their wealth structures with values of personal growth, emotional well-being, and legacy stewardship, Delaware's Well-Being Trust statute offers a framework for doing just that. Various trust modification statutes can be used to accomplish this.



**Collaboration &
Team Building Practices**



**Family Dynamics,
Systems Theory, and Relationships**



Advanced Level

SPONSORS

Organizational Partner



Merrill Lynch
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Platinum Sponsor



J.P.Morgan
WEALTH MANAGEMENT