



2027 Sponsorship Opportunities

Rendezvous • Purposeful Planning Symposium • Year-Round Engagement



GET TO KNOW PPI

The Purposeful Planning Institute (PPI) is a nonprofit learning center and a platform for networking and collaboration. Our members include financial advisors, estate planning attorneys, trust officers, wealth managers, family business consultants and coaches, philanthropic consultants, and other professionals who help families navigate the complexities of wealth and wellbeing.

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

We believe that every family's legacy can become a force for good and our mission is to empower advisors and consultants with the tools, resources, and the network they need to foster more positive outcomes for their clients, their families, and the communities they impact.

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

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

OUR COMMUNITY

Top Membership Levels

Wealth Managers, Financial Planners & Trustees.....	21%
Family Business Consultants & Coaches.....	20%
Estate Planning Attorneys & Tax Professionals.....	15%
Philanthropy Professionals & Consultants.....	10%
Family Office Professionals & Consultants.....	10%
Ten+ Other Disciplines Serving Families.....	24%

A Growing Movement

600+ Active Members
5,000+ Contacts on PPI Mailing List
3,000+ Followers on PPI LinkedIn Business Page
10,000+ Members on Various PPI LinkedIn Groups

RENDEZVOUS

July 19–22, 2027 | Boulder, Colorado

Rendezvous is the Purposeful Planning Institute's flagship event and the premier gathering of its kind, bringing together a uniquely diverse community of professionals who advise and support families.

Representing more than 20 disciplines, attendees come together for meaningful dialogue, thought-provoking keynotes, and interactive breakout sessions on topics including family dynamics, governance, collaboration, philanthropy, personal development and growth, and more.

What sets Rendezvous apart is its collaborative spirit and intimate atmosphere. It is a place where professionals from different disciplines exchange perspectives, build trusted relationships, and discover new ways to serve families more holistically. The result is a one-of-a-kind learning and networking experience that participants consistently value.

In 2027, attendance will be intentionally capped to preserve the quality, depth, and personal connection that define the Rendezvous experience. In recent years, Rendezvous has sold out and registration has closed early.

Sponsorship provides an opportunity to secure a meaningful presence at this highly sought-after gathering while connecting your organization with a diverse community of purpose-driven professionals. Reserve your sponsorship, and your place at Rendezvous, today!



PURPOSEFUL PLANNING SYMPOSIUM

February 10-12, 2027 | Live Virtual Event

The Purposeful Planning Symposium offers a unique opportunity for advisors and consultants to learn how to **integrate technical expertise with qualitative skills**, becoming more well-rounded and effective planners. Participants will gain access to engaging professional education and networking through an **interactive virtual format**.

Led by nationally renowned thought leaders and experienced practitioners, the Symposium introduces the foundational principles of Purposeful Planning while offering advanced insights on helping clients achieve greater family flourishing and personal wellbeing through intentional planning.

Attendees will learn how to move beyond transactional client relationships, embracing a more generative approach that aligns technical planning with qualitative planning.

Participants can expect to leave with practical strategies they can apply immediately—from strengthening client relationships and conversations to integrating qualitative perspectives into their technical planning work.

Most, if not all, sessions are eligible for continuing professional education (CPE), making the Symposium a valuable opportunity for ongoing professional development.

Because the Symposium is delivered virtually and attendance is not capped, **sponsors can gain visibility with a large and diverse audience**, while connecting their organizations with high-quality education, innovative thinking, and the growing Purposeful Planning movement.



ORGANIZATIONAL PARTNER

\$22,500

Organizational Partners are more than sponsors. They are strategic contributors to a movement shaping the future of Purposeful Planning. Your organization receives meaningful, year-round visibility and opportunities to engage with the PPI community across our programs, events, and digital channels.

Year-Round Partnership & Visibility

- ✓ Listing as Organizational Partner with company logo featured on PPI website(s)
- ✓ Recognized as an Organizational Partner in annual email broadcast to PPI members
- ✓ One-year **PPI membership** for up to **five individuals** from your organization
- ✓ Exclusive Podcast Sponsorship, offering dedicated visibility as the sole sponsor of a selected podcast episode
- ✓ Exclusive Webinar Sponsorship, offering high visibility as the sole sponsor of a selected webinar
- ✓ Announcement of your Organizational Partnership on PPI's LinkedIn Business Page, reaching a community of 3,000+

Rendezvous

- ✓ **Five registrations** to **Rendezvous** for members of your organization
- ✓ Opportunity to purchase up to five additional Rendezvous registrations at 50% off published price
- ✓ Opportunity to host a 6-foot exhibitor table in a featured location
- ✓ Opportunity to host up to two intentionally curated small group dinners during Rendezvous
- ✓ Opportunity to provide a brief 2–3 minute introduction of your organization from the main stage
- ✓ Organizational Partner recognition on the Rendezvous event website, in event materials, and on-site signage
- ✓ Badge ribbon identifying your organization's representatives as sponsors

Purposeful Planning Symposium

- ✓ **Five registrations** to **Symposium** for members of your organization
- ✓ Opportunity to purchase up to five additional Symposium registrations at 50% off the published price
- ✓ Opportunity to provide a brief 2–3 minute introduction of your organization during a plenary session
- ✓ Organizational Partner recognition on the event website, brochure, and mobile app

PLATINUM EVENT SPONSOR

Platinum \$14,200 | Rendezvous Only: \$10,600 | Symposium Only: \$6,000

Maximize your visibility across PPI's two signature educational events by becoming a Platinum Event Sponsor. Sponsoring both Rendezvous and the Purposeful Planning Symposium provides expanded visibility and meaningful engagement with PPI's interdisciplinary community—while offering a 15% savings compared to sponsoring each event separately. Choose the level of engagement that best fits your organization.

Both Events | \$14,200

- ✓ Rendezvous Platinum Sponsorship
- ✓ Purposeful Planning Symposium Platinum Sponsorship
- ✓ **One-year PPI membership for up to three individuals from your organization**

Rendezvous Only | \$10,600

- ✓ **Three registrations to Rendezvous** for members of your organization
- ✓ Opportunity to purchase up to three additional Rendezvous registrations at 50% off published price
- ✓ Opportunity to host a 6-foot exhibitor table in a featured location
- ✓ Opportunity to host up to two intentionally curated small group dinners during Rendezvous
- ✓ Opportunity to provide a brief 2–3 minute introduction of your organization from the main stage
- ✓ Platinum Sponsor recognition on the Rendezvous event website, in event materials, and on-site signage
- ✓ Badge ribbon identifying your organization's representatives as sponsors
- ✓ Inclusion in post recognizing event sponsors on PPI's LinkedIn Business Page, reaching a community of 3,000+
- ✓ Inclusion in an email to event attendees recognizing and thanking event sponsors

Purposeful Planning Symposium Only | \$6,000

- ✓ **Three registrations to Symposium** for members of your organization
- ✓ Opportunity to purchase up to three additional Symposium registrations at 50% off the published price
- ✓ Opportunity to provide a brief 2–3 minute introduction of your organization during a plenary session
- ✓ Platinum Sponsor recognition on the event website, brochure, and mobile app
- ✓ Inclusion in post recognizing event sponsors on PPI's LinkedIn Business Page, reaching a community of 3,000+
- ✓ Inclusion in an email to event attendees recognizing and thanking event sponsors

GOLD EVENT SPONSOR

Gold \$11,200 | Rendezvous Only: \$8,900 | Symposium Only: \$4,200

Expand your organization's visibility and engagement with the PPI community by becoming a Gold Sponsor. Gold-level sponsorship offers meaningful exposure at either Rendezvous or the Purposeful Planning Symposium, with opportunities to connect your organization with PPI's interdisciplinary community of advisors and consultants. Choose the level of engagement that best fits your organization.

Both Events | \$11,200

- ✓ Rendezvous Gold Sponsorship
- ✓ Purposeful Planning Symposium Gold Sponsorship
- ✓ **One-year PPI membership for up to two individuals from your organization**

Rendezvous Only | \$8,900

- ✓ **Two registrations to Rendezvous** for members of your organization
- ✓ Opportunity to purchase up to two additional Rendezvous registrations at 50% off published price
- ✓ Opportunity to host a 6-foot exhibitor table in a featured location
- ✓ Opportunity to host up to two intentionally curated small group dinners during Rendezvous
- ✓ Gold Sponsor recognition on the Rendezvous event website, in event materials, and on-site signage
- ✓ Badge ribbon identifying your organization's representatives as sponsors
- ✓ Inclusion in post recognizing event sponsors on PPI's LinkedIn Business Page, reaching a community of 3,000+
- ✓ Inclusion in an email to event attendees recognizing and thanking event sponsors

Purposeful Planning Symposium Only | \$4,200

- ✓ **Two registrations to Symposium** for members of your organization
- ✓ Opportunity to purchase up to two additional Symposium registrations at 50% off the published price
- ✓ Gold Sponsor recognition on the event website, brochure, and mobile app
- ✓ Inclusion in post recognizing event sponsors on PPI's LinkedIn Business Page, reaching a community of 3,000+
- ✓ Inclusion in an email to event attendees recognizing and thanking event sponsors

SILVER EVENT SPONSOR

Silver \$6,795 | Rendezvous Only: \$5,400 | Symposium Only: \$2,500

Build visibility and meaningful connections with PPI's interdisciplinary community through a Silver Sponsorship. Choose the option that best aligns with your organization and goals.

Both Events | \$6,795

- ✓ Rendezvous Silver Sponsorship
- ✓ Purposeful Planning Symposium Silver Sponsorship
- ✓ **One one-year PPI membership**

Rendezvous Only | \$5,400

- ✓ **One complimentary registration to Rendezvous**
- ✓ Opportunity to purchase one additional Rendezvous registration at 50% off published price
- ✓ Opportunity to host a 6-foot exhibitor table in a featured location
- ✓ Opportunity to host one intentionally curated small group dinner during Rendezvous
- ✓ Silver Sponsor recognition on the Rendezvous event website, in event materials, and on-site signage
- ✓ Badge ribbon identifying your organization's representatives as sponsors
- ✓ Inclusion in post recognizing event sponsors on PPI's LinkedIn Business Page, reaching a community of 3,000+
- ✓ Inclusion in an email to event attendees recognizing and thanking event sponsors

Purposeful Planning Symposium Only | \$2,500

- ✓ **One complimentary registration to Symposium**
- ✓ Opportunity to purchase one additional Symposium registration at 50% off the published price
- ✓ Silver Sponsor recognition on the event website, brochure, and mobile app
- ✓ Inclusion in post recognizing event sponsors on PPI's LinkedIn Business Page, reaching a community of 3,000+
- ✓ Inclusion in an email to event attendees recognizing and thanking event sponsors

RENDEZVOUS EXHIBITORS

\$4,500

Connect with PPI's diverse community of advisors and consultants through an on-site exhibitor presence at Rendezvous. Gain visibility for your organization while creating opportunities for meaningful conversations and connections throughout the event.

Benefits Include

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



SPONSORSHIP COMMITMENT FORM

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

☐ **Organizational Partner** \$22,500

☐ **Platinum** \$14,200

☐ **Gold** \$11,200

☐ **Silver** \$6,795

☐ **Rendezvous Exhibitor** \$4,500

Individual Event Sponsorship

- ☐ Rendezvous Only Platinum Sponsorship - \$10,600
- ☐ Rendezvous Only Gold Sponsorship - \$8,900
- ☐ Rendezvous Only Silver Sponsorship - \$5,400
- ☐ Symposium Only Platinum Sponsorship - \$6,000
- ☐ Symposium Only Gold Sponsorship - \$4,200
- ☐ Symposium Only Silver Sponsorship - \$2,500

Rendezvous Individual Items

- ☐ Keynote Speaker - \$10,000
- ☐ Community Banquet Dinner - \$8,000
- ☐ Welcome Reception - \$5,000
- ☐ PPI Resource Library - \$3,500
- ☐ ~~Name Badges and Lanyards - \$2,000~~ *Fulfilled*
- ☐ Social / Networking / Wellness Activity - Varies

Symposium Individual Items

- ☐ Keynote Speaker - \$5,000
- ☐ Virtual Event Platform - \$2,500
- ☐ Recording Package - \$2,000

Company Name

Signature of Authorized Company Official or Representative

Date

Contact Name

Contact Phone

Contact Email

Address

City/State/Zip

Please return this application to info@purposefulplanninginstitute.com.

CODE OF CONDUCT FOR PPI SPONSORS

The Purposeful Planning Institute is grateful for the support of our sponsors and Organizational Partners. Your investment helps PPI advance its mission to educate, empower, and develop family advisors to cultivate family flourishing and individual wellbeing. We seek sponsors and partners who **share our commitment to client-centered, purposeful planning and who value the opportunity to build meaningful relationships** within PPI's interdisciplinary community.

PPI events are intentionally designed to foster **generosity, trust, collaboration, openness, and authentic connection**. We believe sponsors add significant value to this community when they participate as contributors and relationship-builders, not simply as vendors or salespeople. To protect this culture and create a positive experience for all participants, we ask sponsors and their representatives to follow the guidelines below.

- PPI does not provide attendee contact information to sponsors. Sponsors may not obtain, use, or distribute participant lists or contact information from PPI, its events, event apps, directories, or other PPI platforms for direct marketing, sales outreach, or solicitation.
- Sponsors may collect contact information directly from attendees only when the individual voluntarily chooses to provide it. Sponsors are responsible for obtaining and documenting any required consent before adding individuals to mailing lists or engaging in marketing communications.
- Sponsors are welcome to offer giveaways, drawings, or other incentives at exhibitor tables, provided participation is voluntary and the collection and use of contact information complies with all applicable privacy and anti-spam laws and regulations, including Canada's Anti-Spam Legislation (CASL) when applicable.
- We encourage sponsors to focus on building relationships, sharing knowledge, and contributing to the conversation rather than actively promoting or selling products and services.
- Hard selling, aggressive solicitation, and unsolicited sales pitches are not permitted within PPI events, programs, online communities, or other PPI platforms.
- Sponsors should respect participants' boundaries and allow business relationships to develop organically. When genuine interest in a product, service, or organization is expressed, appropriate business conversations may follow.
- Sponsors should not use educational sessions, networking activities, social gatherings, or other PPI programming as an opportunity for unsolicited sales presentations.

We ask every sponsor and sponsor representative to conduct themselves in a manner that reflects **PPI's values of collaboration, inclusivity, service, learning, and empathy**.

PPI reserves the right to address conduct that is inconsistent with these guidelines or that negatively impacts the experience, safety, or trust of the PPI community. Sponsors or their representatives may be asked to discontinue inappropriate solicitation or other conduct that violates these expectations.

Failure to comply with PPI's Solicitation Guidelines & Code of Conduct may result in the loss of sponsorship benefits, forfeiture of PPI membership, removal from an event, and/or restriction from participating in future PPI programs and events.