



Purposeful Planning Institute  
**RENDEZOOM**  
JULY 21 - 23, 2021  
*Courageous Resilience: Thriving in Turbulent Times*

Innovation is driven by need and now is no different. Learn from thought leaders in your field to work together to meet the current and new needs of clients. We invite you to join us and explore how to thrive, rather than just survive, during these turbulent times. At RendeZoom, you will converge with leaders to advance greater purpose and meaning with the families you serve.

*The Purposeful Planning Institute (PPI) provides members with clear processes and effective practice methods to provide their clients with the finest service.* Members include financial advisors, estate planning attorneys and other professionals and consultants that serve families of wealth and families in business. Members are able to access our innovative and cutting edge techniques through our educational content, weekly interviews with thought leaders, programs, events, training and more.

Topics Include:

- Family Dynamics & Culture
- Family Governance & Leadership
- Philanthropy, Stewardship & Legacy
- Professional Collaboration
- Personal Development & Growth
- Cutting Edge Legal & Tax Topics
- Trustscape & Financial Planning

Presented by the  
 **Purposeful Planning Institute**

4600 S. Syracuse, 9th Floor Denver, Colorado 80237 | 720-458-7777 | [info@purposefulplanninginstitute.com](mailto:info@purposefulplanninginstitute.com)

## PLANNING EXPEDITIONS

The quality of RendeZoom 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®, Managing Director Planning Strategy & Research, Partner, Aspiriant

Cathy Carroll, MBA, Founder, Legacy Onward

Mark C. Hartnett, J.D., MBA, CFP®, AEP®, Managing Director, Argent Family Wealth Services

Kristen Heaney, MSW, BCC, Legacy Consultant, Legacy Capitals, LLC

Steve Legler, MBA, CFA, FEA, Family Legacy Coach & Advisor at TSI Heritage

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

Matthew Wesley, JD, MDiv, Managing Director, Merrill Center for Family Wealth™, PPI Dean of Family Culture

### Wisdom Expedition

Doug Baumuel, MBA, Partner, Continuity Family Business Consulting

Nathan Dungan, Founder and President of Share Save Spend

Amanda Koplín, CEO of Koplín Consulting

Steve Legler, MBA, CFA, FEA, Family Legacy Advisor, TSI Heritage

Scott Mathewson, CFP®, Founder, Elevare LLC

Shilpa Mirchandani, Senior Wealth Planner, Senior Vice President at City National Bank

Michelle Osry, Partner, Canadian Practice Leader, Family Enterprise Consulting at Deloitte Canada

### Experience Expedition

Mary Anderson, Program Director of Advanced Legal Training Institute

Sandi Bragar, CFP®, Director, Wealth Management, Principal, Aspiriant

Ella Chase Hyland, Co-Founder, Wellth-Works

Kaley Fennell, Junior Associate, Legacy Capitals, LLC

Marlis Jansen, Founder & CEO of Graddha LLC

Jennifer Laun, CFP®, Healthy Human Being Advocate

Lisa Orlick, PCC, Coach & Consultant at Lisa Orlick Coaching & Consulting, LLC

Jeff Savlov, Founder, Blum & Savlov, LLP - Family Business & Wealth Consulting

## THANK YOU to the 2021 RendeZoom Sponsors!



FAIR SPLIT  
DIVIDE THINGS, NOT FAMILIES



Limited sponsorship opportunities are still available. Please contact us for more information.

## REGISTRATION DETAILS

**Member Rate:** \$695 (\$795 after June 7th)

**Non-Member Rate:** \$895 (\$995 after June 7th)

**Not a member?** We've got you covered. Register now and you'll have the option of adding an annual membership for 50% off!

Register at <https://purposefulplanninginstitute.com/2021-rendezoom>.

## NETWORKING EVENTS & SOCIAL ACTIVITIES

### Rendez-Inspire

Designed to allow attendees to connect and engage as we explore courageous resilience through art, body, and mind.

### Purposeful Pathways

During these brief main stage presentations, we will hear from colleagues whose purposeful choices have made a significant impact on their work individually and across our industry as a whole.

### Rendez-Crew

RendeZoom is known for being a place where professionals can make enduring connections and deepen existing relationships during extended networking breaks. Rendez-Crew offers you an opportunity to join a small group of participants and gather with your "Crew" at the end of each day to discuss and digest the day's events.

### Rendez-Experience

This is an experience you won't want to miss! Join us as we explore and experience the sound of courageous resilience as a community of kindred purposeful spirits.

### Rendez-Café

Grab your favorite beverage and join us for a virtual Roundtable Discussion designed to give attendees the opportunity to connect and engage with others around a specific topic. These are intended to be informal small-group discussions. There is no need to pre-register. Just show up at the designated time and select from a variety of fun and engaging table topics.

### Rendez-Celebration

Join us for this fun and engaging wrap-up to 2021 RendeZoom! This closing session will tie a bow on this year's gathering, and leave us all looking forward to being together again in 2022.

### Continuing Professional Education

A total of 6 hours of continuing professional education credits have been granted through the CFP® Board and 8 general CLE credits have been approved by the Colorado Supreme Court Office of Continuing Legal and Judicial Education.

Visit [purposefulplanninginstitute.com/2021-rendezoom](https://purposefulplanninginstitute.com/2021-rendezoom) for more information.

# Live Virtual Summit

All Times Listed are Mountain Time

## Wednesday, July 21st

9:00 am	9:15 am	<b>Welcome &amp; Opening Remarks</b>
9:15 am	10:45 pm	<b>Positive Psychology in Challenging Times</b> <i>James Pawelski, PhD</i>
11:15 am	12:00 pm	<b>Rendez-Inspire</b> <i>Connect and Engage</i>
12:30 pm	1:15 pm	<b>Purposeful Pathways</b> <i>Barb Culver, CFP®, ChFC, CLU, AEP® &amp; Jim Coutré</i>

### Breakout Sessions

1:45 pm	3:00 pm	<b>Navigating High Emotions: How to Equip and Coach Family Members for More Effective Problem-Solving</b> <i>Jeff Strese, CFWA, CFBA</i>
1:45 pm	3:00 pm	<b>Notes from the "Frontline": The Nice Family: Handing Over the Baton with an Iron Fist</b> <i>Stephen Golbart, PhD &amp; Joan DiFuria, MFT</i>
1:45 pm	3:00 pm	<b>Hidden and Hindered: Empowering RisingGen Clients to Reframe Their Shame</b> <i>Kristen Heaney, MSW, BCC, Richard Orland, PhD &amp; Kaley Fennel</i>
1:45 pm	3:00 pm	<b>How Can Advisors Learn to Lean into Conflict, With Confidence?</b> <i>Jane Beddall, MA, JD, Betsy Erickson &amp; Steve Legler, MBA, CFA, FEA</i>
1:45 pm	3:00 pm	<b>Communicating Love &amp; Finding True Wealth</b> <i>Paul Puccinelli, LMFT, MS, Dawn Gross, MD, PhD &amp; Ron Nakamoto, MBA</i>
1:45 pm	3:00 pm	<b>The Forgotten 40 Acres - Repairing Racial Wealth Disparity Using the Estate Tax and New Charitable Incentives (Fusion)</b> <i>Raymond C. Odom, Esq &amp; Sarah Johnson, JD</i>
3:30 pm	4:15 pm	<b>Rendez-Crew</b> <i>Small Group Networking/Social/Community Building Experience</i>
4:30 pm	5:30 pm	<b>Rendez-Experience</b> <i>The Social Kick-Off of RendeZoom 2021</i>

## Thursday, July 22nd

9:00 am	10:00 am	<b>Rendez-Café</b> <i>Grab your favorite beverage for a roundtable discussion.</i>
10:30 am	11:30 pm	<b>Positive Psychology - Wealth 3.0 in Action</b> <i>Kristin Keffeler, MSM, MAPP</i>
12:00 pm	12:45 pm	<b>Rendez-Inspire</b>

### Breakout Sessions

1:15 pm	2:30 pm	<b>Exploring the Psychology and Physiology Behind Generational Snags to Assist Families in Navigating the Great Wealth Transfer</b> <i>Amy Szostak &amp; Elizabeth T. Meck</i>
1:15 pm	2:30 pm	<b>Building Rapport, Reinforcing Strengths, and Evoking Motivation: The Subtle World of Reflective Listening</b> <i>Joseph Kuo, CFP®, CMA &amp; Kjartan Jansen, MA, CFA</i>

Continued on next page.

# Live Virtual Summit

All Times Listed are Mountain Time

## Thursday, July 22nd Cont.

1:15 pm	2:30 pm	<b>A Look in the Mirror: Understanding and Overcoming Barriers to Healthy Boundaries</b> <i>Melissa Mitchell-Blicht, MS, MA</i>
1:15 pm	2:30 pm	<b>The Test of Resilience: Emerging from Turbulence</b> <i>Matthew Wesley, JD, MDiv &amp; Valerie Galinskaya, MBA</i>
1:15 pm	2:30 pm	<b>Wake up Karen: How to Best Address Conscious and Unconscious Biases</b> <i>Emily Bouchard, MSSW, Thomas Thiegis, MA, Amanda Koplín, LPC &amp; Karen McNeill, PhD</i>
1:15 pm	2:30 pm	<b>Merchants of Meaning - Engaging the Marketplace of Intention, Purpose, and Impact (Fusion)</b> <i>David R. York, Esq., CPA</i>
3:00 pm	3:45 pm	<b>Rendez-Crew</b> <i>Small Group Networking/Social/Community Building Experience</i>

## Friday, July 23rd

9:00 am	10:00 am	<b>Rendez-Café</b> <i>Grab your favorite beverage for a roundtable discussion.</i>
10:30 am	11:15 am	<b>Purposeful Pathways</b> <i>Joan DiFuria &amp; Stephen Golbart, Amanda Koplín</i>

### Breakout Sessions

11:45 am	1:00 pm	<b>Are The Stories That Help Us Thrive Being Overlooked?</b> <i>Ella Chase, Michelle Langdon &amp; Veronica Yopez, JD, MBA, TEP</i>
11:45 am	1:00 pm	<b>The Family Factor—Measuring and Strengthening the Family Bond</b> <i>Doug Baumöel, MBA</i>
11:45 am	1:00 pm	<b>Developmental Possibilities in the Aging Process</b> <i>Chris Wahl, MA.Ed</i>
11:45 am	1:00 pm	<b>Pandemic and Purpose- Best Practices in Youth and Teen Philanthropy</b> <i>Sue Schwartzman, MAEd, Simon Shachter, PhD Candidate &amp; Rachel Levenson</i>
11:45 am	1:00 pm	<b>What's Love Got To Do With It? Love and the Art of Purposeful Planning</b> <i>Marlis Jansen, MA, FBS &amp; Lindsay Fletcher Hardie, PhD</i>
11:45 am	1:00 pm	<b>Drafting Trusts with Greater Purpose and Guidance - How to Avoid the "IT" Problem (Fusion)</b> <i>John "John A" Warnick, Esq.</i>
1:30 pm	2:30 pm	<b>The Path Before Us</b> <i>Stacy Allred Interviews James E. Hughes, Jr., Esq.</i>
2:30 pm	2:45 pm	<b>Rendez-Celebration</b> <i>Closing Session</i>
3:15 pm	4:00 pm	<b>Rendez-Crew</b> <i>Small Group Networking/Social/Community Building Experience</i>

**Save the Dates! • July 18–22, 2022 • July 17–21, 2023**

# 2021 Keynote Sessions



## Positive Psychology: Help for Challenging Times

James Pawelski, PhD,  
Professor of Practice and  
Director of Education,  
Positive Psychology

Center at the University of Pennsylvania

With a global pandemic, a national reckoning around social justice, severe political polarization, and no shortage of problems in our own personal lives, it is clear that we are living in challenging times. It can seem obvious in such times that we need to focus exclusively on the problems at hand. But is this the most effective way forward?

Positive psychology suggests that cultivating things like positive emotions, character strengths, and strong relationships may be especially important for dealing with adversity. In this interactive session, we will explore the theory, research, and practice of positive psychology, focusing on how it might help us in challenging times.

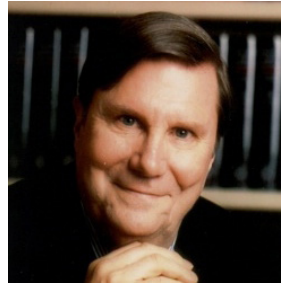


## Positive Psychology: Wealth 3.0 in Action

Kristin Keffeler, MSM,  
MAPP, Founder of  
Illumination360

PPI has challenged your field to move from the existing paradigm (which has been called Wealth 2.0) to a new paradigm, Wealth 3.0. This presentation will help you create an actionable roadmap for that transition. And there are no practitioners better suited to apply these concepts than those in our PPI community. During this keynote we will explore:

- The latest research and application in the field of Positive Organizations
- The research and application in the field of thriving families and family systems
- The research and application in the field of individual growth and impact



## The Path Before Us: A Reflective Conversation with Jay Hughes

James E. Hughes, Jr, Esq.,  
Author & Philosopher

Jay Hughes is a beloved thought leader and elder in our community. Over many years, his wisdom has inspired us, educated us and motivated us to do great work with the clients and families we serve.

In this rare opportunity, we will have a chance to listen to Jay in intimate conversation with Stacy Allred about the issues that have mattered most to him for years and what is currently on his mind as clients face a new, challenging and in many ways uncertain future.

Please join Stacy and Jay in their exploration of the path forward as the conference comes to a close and the real work in our respective worlds begins.

**“This is my favorite professional gathering of the year! Whether we’re meeting in-person or virtually, I’m nurtured, energized, and stimulated by this amazing community of thought leaders.”**

**—Sandi Bragar, CFP®,  
Managing Director Planning  
Strategy & Research,  
Partner, Aspiriant**

# 2021 Purposeful Pathways

During these brief main stage presentations, we will hear from colleagues whose purposeful choices have made a significant impact on their work individually and across our industry as a whole.

## Post-COVID Purposeful Planning

Barbara A. Culver, CFP®, ChFC, CLU, AEP®

Barb has been asked to quickly share key life and career decisions which led her to help influence the formation of the Purposeful Planning movement. She will then add insights to alter current practices due to COVID-19. In addition to suggesting new key questions to ask clients and their families, Barb will also recommend specific topics for advisors to add to their client conversations.

## Do The Thing You Can Do

Jim Coutré, VP of Insights and Connections at Fidelity Family Office Services

Leaning heavily into his mix of empathy, optimism and impatience, Jim shows up unapologetically as himself for his clients and our community. In doing so, he pushes aside the non-useful, clearing the way for a focus on the hard and messy work that has a positive impact on self, family and society - and reminding those around him that we are capable of and accountable for doing the same in whatever ways we can.

## What Does It Take to Create a Life Worth Living

Amanda Koplin, LPC, CEO of Koplin Consulting

Too many people are just surviving, and not truly LIVING. Learn how the questions you ask yourself can create and shape pivotal moments and change your thoughts, behavior, and the meaning you assign to each situation.

## 25+ Years of Partnership and Collaboration

Stephen Goldbart, PhD and Joan DiFuria, MFT, Co-Founders of the Money, Meaning & Choice Institute

Joan DiFuria and Stephen Goldbart, Co-Directors of MMCI, will share their story of building and creating Money, Meaning, & Choices Institute, talk about what inspired them to join forces, their belief in "1 + 1 = 3," the benefits and opportunities of their partnership at its best, the challenges of their partnership at its worst, and what they have learned in their 3 decades of work as family wealth consultants.



# 2021 Fusion Breakout Sessions

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## **Merchants of Meaning - Engaging the Marketplace of Intention, Purpose, and Impact (Fusion)**

David R. York, Esq., CPA

We live in a world that tells us how to live, what matters (and what doesn't), and how to get what it says we want. These impersonal, external forces push us around and leave us off-balance, confused, and fatigued. Like actors following a script we didn't write, we find ourselves uncertain of where we have ended up, much less where we want to go, and asking ourselves, "What am I supposed to do next?". Among us, however, are those who live differently. Held steady by the pull of purpose that comes from the gravitational force of something far bigger than themselves, they amplify that draw with their own deep personal engagement. These women and men live in an upward spiral of clarity, vision and balance that guides their lives and allows them to make lasting impacts in the World. More than mere consumers, dreamers or even owners, these people have found the secret to a life lived as...a Steward. This presentation will outline the mindset, characteristics, and traits of these remarkable people and how you can create a Steward mentality for yourself and the clients you serve.

## **The Forgotten 40 Acres - Repairing Racial Wealth Disparity Using the Estate Tax and New Charitable Incentives (Fusion)**

Raymond C. Odom, Esq & Sarah Johnson, JD

This program will address the history behind the initial success and ultimate failure of Sherman's Special Order 15 promising freed slaves 40 acres (but not a mule), and the case for reparations today by covering the following: Government denial of Black property rights; Today's racial wealth gap; Examples of reparations paid by other nations and the U.S.; and the estate tax and new charitable incentives as the perfect funding source for reparations.

## **Drafting Trusts with Greater Purpose and Guidance - How to Avoid the "IT" Problem (Fusion)**

John "John A" Warnick, Esq.

There is often a huge gap between the expectations of Trust Creators and Beneficiaries regarding trust distributions and what trustees feel they are authorized to distribute to a beneficiary. In this breakout we'll consider why this gap exists and how we can bridge the gap to create a more positive trustee/beneficiary/trust creator environment. John A will be sharing some new and very practical PPI Exercises which help trust creators better envision both the types of distributions they'll want to permit and the material purposes they don't want defeated when the trust agreement is amended, decanted or reformed. This session will be helpful to not just the attorney drafting a trust/will but also to consultants and advisors who are assisting clients envision the impact they want their testamentary and trust vehicles to have. Each participant will receive three tools they can use with and share with clients and other advisors/consultants: The Red, Yellow, Green Zone Distributions Visioning Exercise - The Trust Compass - A Guide to Creating Clarity Around the Material Purposes of Your Trust - and The Four Reasons You Should Complete the Red, Yellow, and Green Zone Trust Distributions Exercise



# 2021 Breakout Sessions

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## **Navigating High Emotions: How to Equip and Coach Family Members for More Effective Problem-Solving**

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

Explore some best practices on equipping family members with communication and problem-solving skills... especially when high emotions emerge. This session will focus on effective strategies on how to influence the family culture and coach family members on these foundational skills - leveraging principles of effective communication, emotional intelligence and healthy family dynamics. How do you personally respond to high emotions? Can you be more prepared? Adult learning strategies alone can be ineffective if the practitioner is unprepared for high emotions in a family setting. This session will be a time to learn, reflect, and sharpen your own skills in a collaborative environment with your other PPI colleagues.

## **The Nice Family: Handing Over the Baton with an Iron Fist**

Stephen Goldbart, PhD, Co-Owner and Co-Founder of Money, Meaning & Choice Institute & Joan DiFuria, MFT, Co-Owner and Co-Founder of Money, Meaning & Choice Institute

We will tell the story of the "Nice" family, a case study of a 4-generation family transitioning power from G2 to G3. A succession process had the blessing of G1, a true believer in planning, but found that handing over the reins was much harder on himself than he or his adult children had anticipated. It is a story of family love, loyalty, respect, control, fear, and rebellion. It is a story that shows how "the best intentions" can be side railed by individual and family dynamics that the family would rather "sweep under the rug". In this open discussion with participants, we will share our three-year work journey with this family.

## **Hidden and Hindered: Empowering RisingGen Clients to Reframe their Shame**

Kristen Heaney, MSW, BCC, Legacy Consultant at Legacy Capitals, Richard Orland, PhD & Kaley Fennel, Life Coach, Associate and Creative Coordinator at Legacy Capitals

This honest, interactive session explores an emotion that deeply inhibits Rising Generation family members' ability to thrive. How can we as advisors empower our clients to navigate their feelings of shame? Facilitators present foundational shame theory, but then overlay it with the experience of the Rising Generation population by sharing a moving video, set to music, depicting real rising generation clients' direct quotes that illustrate their struggles with shame. The remaining time will be spent in small group discussion, followed by a large group debrief, to process a written case study asking participants to consider actionable ways to help clients thrive in the midst of this turbulent emotion.

## **How Can Advisors Learn to Lean Into Conflict, With Confidence?**

Jane Beddall, MA, JD, Founder and Principal of Dovetail Resolutions, LLC, Betsy Erickson, Senior Director of Philanthropy at Arabella Advisors & Steve Legler, MBA, CFA, FEA, Family Legacy Coach & Advisor at TSI Heritage

Conflict is a common occurrence in legacy families. Yet many advisors feel deeply uncomfortable with conflict. Attendees will be encouraged to overcome their discomfort by learning how to approach conflict with greater confidence. We will first share specific tools and ideas to deal with conflict without inflaming it, avoiding it, or denying it.

Next, through scenario role plays, participants will practice using and refining these tools to build their personal competence and comfort in dealing with conflict. With a few tools and some practice, advisors can build their confidence to better serve legacy families, even when conflict is present.

# 2021 Breakout Sessions

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## Communicating Love & Finding True Wealth

Paul Puccinelli, LMFT, MS, Next Generation Networking Specialist at AT&T, Dawn Gross, MD, PhD, Co-Founder/CEO Dyalogues, Inc. & Ron Nakamoto, MBA, Co-Founder of EW Plus, LLC

Volatile, uncertain, complex and ambiguous are salient words for today's world. Yet you don't need pandemics, social injustices or climate crises to invoke any of them. It is the world we live in, always. So how do you navigate what is most important to you when chaos ensues? This workshop will invite you to focus on something you've lost as a path to discovering and defining what you Love. Clarifying what is True Wealth for you will empower you to support the discovery of what True Wealth means to those you love and serve.

## Exploring the Psychology and Physiology Behind Generational Snags to Assist Families in Navigating the Great Wealth Transfer

Amy Szostak, Director of Family Education and Governance, Northern Trust Company & Elizabeth T. Meck, Vice President, The Northern Trust Company

As advisory professionals, we are no strangers to the looming Great Wealth Transfer from older to younger generations. Time and time again, we have heard about the obstacles families encounter as they attempt consensus around a set of values and visions for the future. Many of these obstacles seem to stem from diversity of ages, experiences, and worldviews. If we break it down to the most fundamental common ground, human emotions, we can begin to see ways to bring families together, embrace diversity and increase creativity. Join us as we reframe generational differences through a psychological and physiological lens and co-create actionable takeaways we all can use to achieve harmonious interactions.

## Building Rapport, Reinforcing Strengths, and Evoking Motivation: The Subtle World of Reflective Listening

Joseph Kuo, CFP®, CMA, Founder of Abundance Wealth Planning, LLC & Kjartan Jansen, MA, CFA, Co-Founder and CFO, Graddha

As trusted advisors, we trust in the clients' expertise in themselves and honor their autonomy. At the same time, when clients have articulated a direction they want to go but are stuck on their way, we can be guides. Through skillful use of reflections, we can help highlight clients' strengths and reconnect them with their whys while reducing resistance in the way.

This workshop highlights how Motivational Interviewing uses complex reflections to evoke "change talk" and reduce "sustain talk." Attendees will have opportunities to practice listening for change talk and experiment with reflections.

## A Look in the Mirror: Understanding and Overcoming Barriers to Healthy Boundaries

Melissa Mitchell-Blicht, MS, MA, Founder of Eredita Consulting, Author & PPI Dean of Individual Development

We all have an Achilles' heel when it comes to maintaining our boundaries – a situation or relationship in which it's hard to use both our *yes* and our *no*. Maybe it's a family member, a client, or our work. We know better, but sometimes struggle to put wisdom to work for us.

In this session, we'll take a brave look in the mirror. A compassionate examination of what trips us up. Then we'll consider what can help us get unstuck – and start building better boundaries in all areas of our life.

# 2021 Breakout Sessions

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## **The Test of Resilience: Emerging from Turbulence**

Matthew Wesley, JD, MDiv, Managing Director, Merrill Center for Family Wealth & Valerie Galinskaya, MBA, Managing Director, Merrill Center for Family Wealth

The world around us is emerging from an unprecedented time of turbulence. For our clients and their families, traversing the emergence from any transformation is filled with multiple possibilities, ranging from the triumphant to the tragic. The Merrill Center for Family Wealth has spent the last year focused on developing specific frameworks, techniques and tools that help families emerge from turbulence with greater resilience, wisdom, capacity and capability than they had before. From this larger work, we are eager to share two frameworks, two methodologies and two tools that you will be able to immediately apply with your clients and their families.

## **Wake up Karen: How to Best Address Conscious and Unconscious Biases**

Emily Bouchard, MSSW, Leadership and Legacy Consultant, Ascent Private Capital Management, Thomas Thiegis, MA, Leadership and Legacy Consultant, Ascent Private Capital Management, Amanda Koplín, LPC, CEO of Koplín Consulting & Karen McNeill, PhD, Director, SVP, Sr. Family Historian at Ascent Private Capital Management of U.S. Bank

Whether it's "Karen," "Cuck," "Millennial" or "OK Boomer," stereotypes influence interactions and trust. Knowing how to respond and navigate situations when these and other memes, stereotypes and categories are aimed at you or others is important in successfully working with multigenerational families. During this session we will provide evocative, true stories to catalyze a conversation and workshop focused on effective approaches to both internal and external biases we encounter every day. Participants will be empowered with greater self-awareness and

relevant techniques for generating positive connection and mutual understanding, no matter what differences may kick off a conversation.

## **Are the Stories That Help Us Thrive Being Overlooked?**

Ella Chase, Co-Founder of Wellth Works, Michelle Langdon, Co-Founder of Wellth Works & Veronica Yopez, JD, MBA, TEP, CEO of Perpetum Family Office

All of the "Great Tales" of history and many family legacies are written from a male perspective, and yet we know that as Jay Hughes remarks, 'Family is determined by the women, the mothers, they are the heart of the family and guarantee its survival'. However as Emily Lesser (Author, Cassandra Speaks) keenly points out, the 'Great Tales' of history are written from a male perspective. If women held the power to tell stories about family wealth and legacy, what would be different about our work and the way our clients frame and live their values, culture, and families when it comes to wealth and legacy? This session will guide participants through an interactive experience exploring our work as advisors and our interaction with an often untold side of the family's history, offering each the opportunity to help clients re-write their family history from a new perspective. What would be different?

Stories that value caretaking, champion compassion, unity, and elevate communication over vengeance and competition, may emerge. Walk away with new perspectives to apply to turbulent times.

# 2021 Breakout Sessions

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## **The Family Factor—Measuring and Strengthening the Family Bond**

Doug Baumoel, MBA, Founding Partner, Continuity Family Business Consulting, Author & Speaker

In our book *Deconstructing Conflict*, we present the Family Factor—the “glue” that describes a family’s cohesion and resilience. Family Factor answers the question: Is the family bond strong enough to leverage compromise, forgiveness, and commitment to change? This concept has sparked much interest from advisors and families, who want to know how to grow Family Factor—what actions to take. This discussion will be a deep dive into the Family Factor, including how to measure and build it, and how to integrate Family Factor work into your engagements with families, beyond its application for working with conflict.

## **What’s Love Got To Do With It? Love and the Art of Purposeful Planning**

Marlis Jansen, MA, FBS, Founder of Graddha LLC & Lindsay Fletcher Hardie, PhD, Legacy Coach and Clinical Psychologist, Sierra Legacy Consulting LLC

At PPI, we encourage families to articulate their true legacies and mentor their rising generations so that their most important values and stories are what guide them. With this approach, governance structures emerge that support thriving family cultures even during challenging times. Families often face dynamics and situations that, if treated with love, can ensure long term family cohesion. What is appropriate “professional love?” Resilience comes from resolving challenges in a loving, supportive environment. If this dynamic is practiced early in life, it replicates itself in adulthood, both personally professionally.

In this interactive session, Marlis Jansen and Lindsay Hardie present current research that links love with resilience, then explore the concept of love in professional roles. Love is much more than a second hand emotion or a sweet old fashioned notion - it is critical for optimal client relationships and outcomes.

## **Developmental Possibilities in the Aging Process**

Chris Wahl, MA.Ed, President at Christine M. Wahl Consulting LLC

Viewed through the lens of Adult Development theory, this session explores how your mindset towards aging influences your relationships with clients, friends, loved ones and even oneself. As we all inevitably age, we can discover new possibilities worth celebrating in one’s third chapter of life. With the most current aging research available, we’ll use small group discussions to foster generative possibilities that challenge cultural norms and provide new ways of going forward, as well as giving forward, both personally and professionally. Participants will leave with the potential of embracing aging in a new way.

## **Pandemic and Purpose: Best Practices in Youth and Teen Philanthropy**

Sue Schwartzman, MA.Ed, Principal at Schwartzman Advising, Simon Shachter, PhD Student of Sociology at Chicago University & Rachel Levenson, Senior Project Leader at Open Capital Advisors

There has never been a more important time to empower the rising generation and let them inform and lead. How can your organization or practice start or enhance a next gen giving program? What might this look like? Why is it important? What are best practices? There is nothing more valuable you can do for your clients then engage their kids in giving back. In this session, you will meet and have a chance to talk to young professionals who were involved in teen philanthropy. Hear how it has made a difference in their lives and learn first-hand what made their experiences valuable. You will also have a chance to “ask an expert” about ways to initiate a program in your organization.

# 2021 FRED Talks On Demand

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In addition to inspiring keynotes and interactive breakout sessions, RendeZoom attendees will have access to on-demand FRED Talks (Frank, Relevant, Educational, Dynamic) throughout the event. Plus, we'll be offering opportunities for attendees to engage in small group discussions with the presenters on many of these topics during our Rendez-Cafe sessions.

## How to Foster Post Traumatic Growth

Ian McDermott, Dean of Innovation and Learning at Purposeful Planning Institute

While there's been plenty of talk about PTSD during the covid pandemic there's been virtually nothing about Post Traumatic Growth (PTG). Indeed, PTG is news to most people. In fact, the idea that personal and societal growth can arise naturally as a direct consequence of grappling with pretty much any kind of trauma has been intensively studied since 1995 and is a well-documented phenomenon. I'd like to share with you the key dimensions of Post Traumatic Growth, how to foster it and how to use this knowledge in our work as trusted advisors.

## Using Visual Models to Think, See, and Engage Systems-and Thrive

Thomasina Williams, JD, Founder of Sankofa Legacy Advisors & Kathy Wiseman, Founder of Working Systems, Inc and Co-Founder of Navigating Systems, Inc.

As advisors, our focus is most often on our clients and what we do for, with and sometimes to our clients. And understandably so. What about us, though? How do we thrive and serve our own needs, while also being a valued resource for our clients, families, and others?

## Families, Habits and Money: A Roadmap to Financial Wellbeing

Nathan Dungan, Owner of Share Save Spend

As advisors to families and family offices we frequently encounter multigenerational families who are underprepared for the journey ahead. Most families and their advisors know what is

coming, #DynastyTrusts and the forces conspiring against them are formidable. However, when we collaborate with families to create intentional learning communities that proactively address quantitative and qualitative issues the opportunity for deeper understanding and enhanced financial wellbeing rises exponentially.

## Grit is in the Soil: Understanding Psychological Fortitude through a "Living Systems" Perspective

Ross Ellenhorn, LICSW, PhD, CEO & Founder of Ellenhorn

There's a new cottage industry on psychological grit and resilience. A lot of it places these faculties squarely bound within our skulls. There's a real problem with understanding our fortitude in this way. And that problem is based on one fact: We are alive. All living creatures are interdependent, and all of them thrive or dive dependent on what's going on around them. In this FRED Talk we delve into a "living systems" approach to fortitude, locating in our clients where issues of grit and resilience are often dependent on a person's place in their family and social "rhizome."

## How Philanthropy Can Impact Climate Change

Bruce DeBoskey, JD, Philanthropic Strategist, The DeBoskey Group

This FRED Talk will explore strategic tools available to philanthropists - including impact investing and strategic grant making - to help deploy philanthropic capital to fight climate change. Bruce will share with the audience information to help combat the most serious existential threat humans have ever faced.

# 2021 FRED Talks On Demand

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## Closing The Performance Gap; Building Resilience

Courtney Pullen, MA, President of the Pullen Consulting Group

In this FRED Talk we will examine the self-limiting beliefs that get in the way of your full potential. Taken from the wisdom of performance coaching we will explore:

- How to reveal the barriers that prevent you from living in harmony in your life
- How to create behaviors that generate more flow
- How to live beyond your self-described potential and see what is possible
- How to teach these skills and build resilience in the lives of your clients

## Leadership is Scalable

Brad Fisher, Published Author - Family Business Abundance

It is a skill, not a fixed talent. Leadership involves fundamental elements that you can learn and strengthen. Some people are born to be world-

class violinists. But most master violinists get there the hard way, through intentional focus and practice, internalizing the basics, and honing their craft until the music seems effortless. Leadership is the same. With a growth mindset and a few fundamentals, you can scale it all the way up. There is a simple equation called the Leadership Leverage Ratio. Clear, concise, and compelling, the *LLR* sets the stage for scalable leadership.

## It's All About the Pivot: Finding Unrealized Opportunities for Families and Caregivers as a result of COVID

Joanna Gordon Martin, Founder and CEO, Theia Senior Solutions and Arden O'Connor, Founder and CEO, O'Connor Professional Group

The pandemic decimated small companies across the globe and negatively impacted our collective mental and physical health. Joanna and Arden share how they adjusted their high touch, concierge business models, to better leverage technology and identify previously unrealized opportunities, thus better addressing client needs and cultivating cohesion amongst their teams.