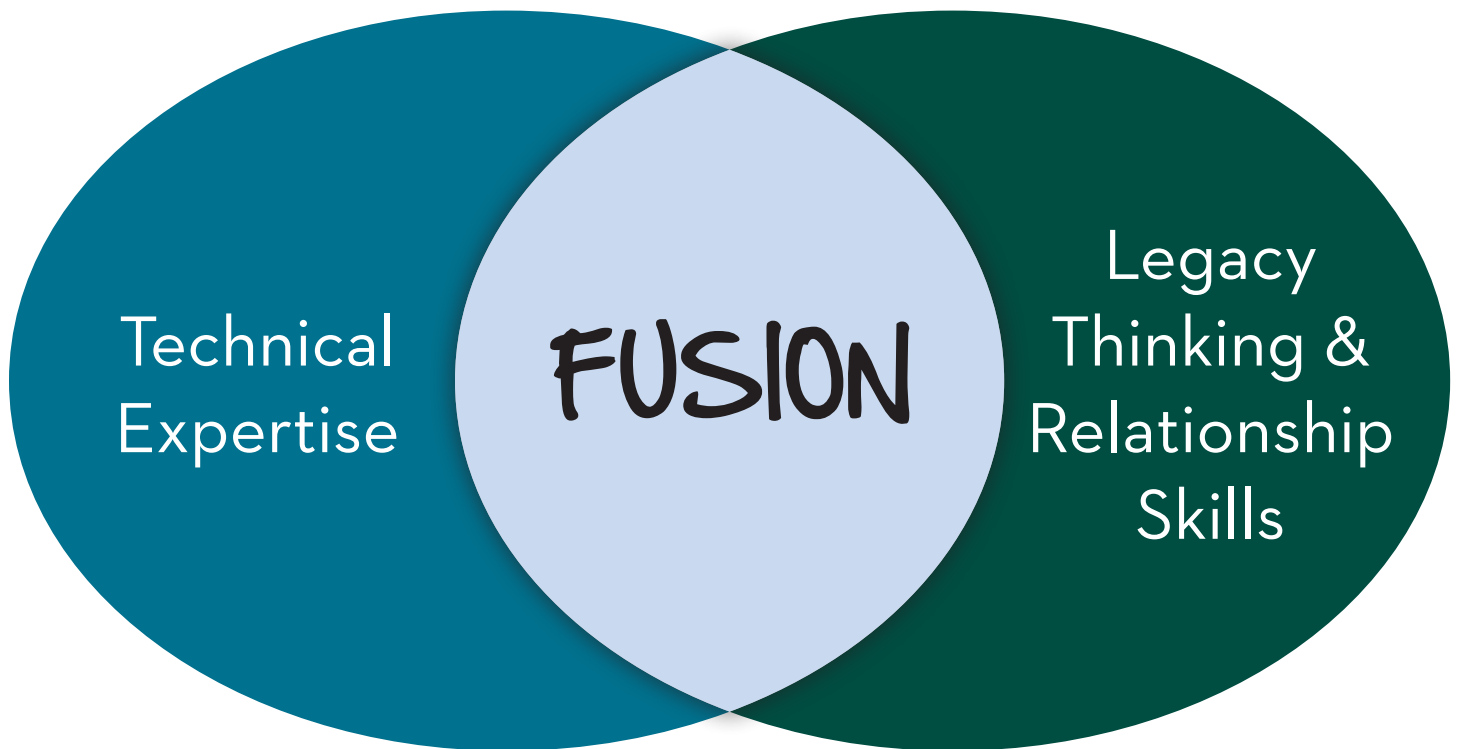


FUSION = Meaningful & Sustainable Planning



July 26th - July 27th, 2016
Omni Interlocken Hotel & Resort
Broomfield, Colorado 80021

Fusion Collaboration is a new symposium for professional advisors and consultants who want to stay current with technical topics and gain awareness of best practices for individual and family flourishing. Fusion Collaboration will showcase the benefits of fusing the technical aspects of Estate Planning and Wealth Management with the positivity of relational and legacy planning.

Presented by the
 **Purposeful Planning Institute**



Registration Details

Member Rate: \$600 (\$750 after May 1st)

Non-Member Rate: \$750 (\$945 after May 1st)

Hotel Information

Omni Interlocken Resort

500 Interlocken Blvd

Denver (Broomfield), Colorado 80021

Call: 1-800-THE-OMNI

Book Online: <https://www.omnihotels.com/hotels/denver-interlocken/meetings/ppi-2016-rendezvous>

Discounted Group Rate: \$159

*Room Rate includes complimentary internet access in your guestroom

Group Rate Cut-Off Date: July 5, 2016

Reservations made after the cut-off date or after the group room block has been filled (whichever comes first) will be accepted on a space- and rate-availability basis. Rooms are limited, so please book early.

Fusion Collaboration will be held at the Omni Interlocken Hotel and Resort located off of Highway 36 between Denver and Boulder. Nestled against the backdrop of the Rocky Mountains, this family friendly resort provides a wealth of activities located right on the premises. Golf enthusiasts will enjoy the 27-hole championship golf course, with its striking scenery and more than 400 feet of elevation changes. The Mokora Spa offers a variety of relaxing and rejuvenating spa services. The Omni Interlocken Hotel and Resort also has two heated outdoor pools.

Other Notes

The weather in Denver in late July should offer temperatures averaging between 61° F and 90° F (low humidity but with possibility of rain). Guests are advised to bring light jackets or sweaters for often heavily air-conditioned hotel meeting rooms, restaurants and cooler evenings outdoors. Suggested attire is business casual.

Before your trip to Denver, and while you are here, drinking plenty of water is the number one way to help your body adjust easily to our higher altitude. The low humidity in Colorado keeps the air dry, like the desert, so you need about twice as much water here as you would drink at home.



Ground Transportation

Royal Blue Town Car Service: Reservations can be made by calling 303-993-4816. The estimated fare for a transportation from DIA to the Omni Hotel and Resort is \$85 (comparable to a standard Taxi) for up to three people.

Shuttle: For airport shuttle service from DIA, the Omni Hotel and Resort recommends Green Ride. Reservations for Green Ride can be made online or by calling (888) 472-6656. Estimated shuttle fare from Denver International Airport to the hotel is \$27 each way. Reservations are required.

Car Rental: All Rental car companies at DIA are located on airport property but are away from the main terminal. Each rental company provides a courtesy shuttle to and from Jeppesen Terminal from their locations. All courtesy shuttles pick-up and drop-off from Jeppesen Terminal Level 5, Island 4, outside doors 505-513 (east side) and 504-512 (west side). For a list of providers visit <http://flydenver.com/rentalcars>.

Directions

From Denver International Airport - 30 Minutes/28 Miles

Exit Airport via Pena Blvd. Take Pena Blvd to Exit # 6B to Fort Collins/E-470 Tollway. E-470 eventually becomes the Northwest Parkway. You will travel 32 miles along E-470 Tollway. Northwest Parkway ends and becomes Interlocken Loop, which will cross over US 36. Follow this to the next light and turn left onto Interlocken Blvd. The hotel is located up the hill on the left hand side, approximately 2 city blocks.

From the South

Take I-25 North to US 36 West. Exit Interlocken Loop/Storagetek Drive and turn left. Proceed 1 block to Interlocken Blvd. and turn left. Hotel is located up the hill on the left side.

From Boulder

Take US 36 East, exit Interlocken Loop/Storagetek Drive, make a right onto Interlocken Loop/Storagetek Drive, then make a left onto Interlocken Blvd. The hotel is located up the hill on the left side.

Please check our website for updates and additional information.

Planning Expeditions

The quality of the Fusion Collaboration 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

Timothy J. Belber, JD, AEP, Founder & Principal of The Alchemia Group LLC and PPI Dean of Fusion

Isabel Miranda, Co-Managing Partner at Pearlman & Miranda, LLC

Courtney Pullen, President of the Pullen Consulting Group

Myra Salzer, Founder and President of The Wealth Conservancy, Inc.

William (Bill) Super, Owner at William Super CPAs & Consultants

Shawn M. Tidwell, Principal at Financial Designs Ltd.

Wisdom Expedition

Randy Fox, Co-Founder, Chief Content Officer at EzCharitable, LLC and Editor in Chief at Planned Giving Design Center, LLC

Richard Harris, CLU, AEP, TEP, Managing Member, Richard L Harris LLC

L. Paul Hood, Jr., JD, Director of Planned Giving, The University of Toledo Foundation, PPI Dean of The Cutting Edge

Dennis Passis, Owner, Gate Enterprises, Inc

Chad Reyes, President and CEO, Wealth and Legacy Group

William (Bill) Super, Owner at William Super CPAs & Consultants

James (Buddy) F. Thomas, Jr., Founder, Chief Planning Officer, Superior Planning, Inc

Thank You to the 2016 Fusion Collaboration Sponsors!

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Agenda & Breakout Session Schedule

Tuesday, July 26th

7:00 am	8:00 am	Breakfast	Taproom/Terrace
8:00 am	8:30 am	What is Fusion And Our Hopes For What This Two Day Fusion Collaboration Experience Will Do For Your Practice John "John A" Warnick, Esq., <i>Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook</i>	Interlocken A
8:30 am	9:30 am	Casting a Vision for Wealth and Its Purpose David R. York, Esq., CPA, <i>Fellow of the American College of Trust & Estate Counsel and Author of Entrusted</i>	Interlocken A
9:30 am	10:30 am	Preserving Family Values by Encouraging Social and Fiscal Responsibility with Modern Trust Structures i.e., Directed Trusts, Special Purpose Entities and Private Family Trust Companies Al W. King, III, J.D., LLM, <i>Founder of South Dakota Trust Company and South Dakota Planning Company</i>	Interlocken A
10:30 am	10:45 am	Break	Interlocken Foyer
10:45 am	12:00 pm	The Best of Heckerling - The Ten Most Significant and Practical Ideas and Strategies from the 2016 Heckerling Institute on Estate Planning Benetta P. Jenson, Managing Director, <i>J.P. Morgan Private Bank and Adjunct Professor of Law at the Northwestern Pritzker School of Law</i>	Interlocken A
12:00 pm	1:00 pm	Lunch	Taproom/Terrace

Breakout Sessions

1:00 pm	2:15 pm	Session #1: Planning Opportunities Using Domestic Trust Jurisdictions i.e. Alaska, Delaware, Nevada, New Hampshire, South Dakota and Wyoming Al W. King, III, J.D., LLM, <i>Founder of South Dakota Trust Company and South Dakota Planning Company</i>	Pine
		Session #2: How Much is Enough - Questions, Conversations and Tools to Help Advisors and Consultants Lead Crucial Conversations with Their Clients Timothy J. Belber, JD, AEP, <i>PPI Dean of Fusion</i>	Spruce
		Session #3: The Philanthropic Filter - A Tool to Maximize the Effectiveness of the Advisor's Efforts to Support the Philanthropic Vision of Our Clients and Ignite Their Philanthropic Passion Randy A. Fox, <i>Founder, EzCharitable, LLC "The Generosity Company", Editor in Chief, Planned Giving Design Center</i>	Fir
		Session #4: Demystifying Life Insurance - How It Works, What It Does, How to Make It Purposeful Richard Harris, CLU, AEP, TEP, and John "John A" Warnick, Esq., <i>Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook</i>	Birch
2:15 pm	2:45 pm	Break	Taproom/Terrace

Tuesday, July 26th Cont.

Breakout Sessions

2:45 pm	4:00 pm	Session #5: Family Advancement Sustainability Trust: Investing into Your Family Not Distributing to Your Family Tom Rogerson, <i>Senior Managing Director and Family Wealth Strategist, Wilmington Trust</i>	Fir
		Session #6: Purposeful Planning in the Transitioning of a Family Enterprise - Practical Tools for Designing Roadmaps and Building More Sustainable Technical Plans John “John A” Warnick, Esq., <i>Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook</i>	Spruce
		Session #7: Bringing Purpose & Meaning to Trust Creation & Administration Hartley Goldstone, <i>Principal of Trustscape LLC, Research Fellow at Wise Counsel Research Associates, and PPI Dean of the Trustscape</i>	Birch
		Repeat Session #1: Planning Opportunities Using Domestic Trust Jurisdictions i.e. Alaska, Delaware, Nevada, New Hampshire, South Dakota and Wyoming Al W. King, III, J.D., LLM, <i>Founder of South Dakota Trust Company and South Dakota Planning Company</i>	Pine
4:00 pm	4:15 pm	Break	Taproom/Terrace

Breakout Sessions

4:15 pm	5:30 pm	Repeat Session #2: How Much is Enough - Questions, Conversations and Tools to Help Advisors and Consultants Lead Crucial Conversations with Their Clients Timothy J. Belber, JD, AEP, <i>PPI Dean of Fusion</i>	Pine
		Repeat Session #3: The Philanthropic Filter - A Tool to Maximize the Effectiveness of the Advisor’s Efforts to Support the Philanthropic Vision of Our Clients and Ignite Their Philanthropic Passion Randy A. Fox, <i>Founder, EzCharitable, LLC “The Generosity Company”, Editor in Chief, Planned Giving Design Center</i>	Spruce
		Repeat Session #5: Family Advancement Sustainability Trust: Investing into Your Family Not Distributing to Your Family Tom Rogerson, <i>Senior Managing Director and Family Wealth Strategist, Wilmington Trust</i>	Fir
		Repeat Session #7: Bringing Purpose & Meaning to Trust Creation & Administration Hartley Goldstone, <i>Principal of Trustscape LLC, Research Fellow at Wise Counsel Research Associates, and PPI Dean of the Trustscape</i>	Birch
6:15 pm	8:00 pm	Dutch Treat Dinners (Optional)*	

***Optional Dutch Treat Dinner Groups** We will organize small (usually 4 to 5 people) groups for those who would like go to a nearby restaurant for a dutch treat dinner on Tuesday, July 26th. This is a great way to meet other like-hearted, like-minded professionals, as well as a wonderful way to enhance your learning and collaborative experience at Fusion Collaboration. *Please indicate upon registration if you would like to be included in a group.*

Agenda & Breakout Session Schedule

Wednesday, July 27th

7:00 am	8:00 am	Breakfast	Taproom/Terrace
8:00 am	8:05 am	Opening Remarks John “John A” Warnick, Esq., <i>Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook</i>	Interlocken A
8:05 am	9:15 am	The Challenges of Collaboration Courtney Pullen MA, LPC, <i>President, Pullen Consulting Group</i>	Interlocken A
9:15 am	10:30 am	The Journey of the Professional Advisor from the Perspective of a Masterful Collaborator James E. Hughes, Jr., <i>Interviewed by Timothy J. Belber, JD, AEP, PPI Dean of Fusion and John “John A” Warnick, Esq., Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook</i>	Interlocken A
10:30 am	10:45 am	Break	Interlocken Foyer

Breakout Sessions

10:45 am	12:00 pm	Session #8: Do You Wanna Play Heads I Win, Tails You Lose, or, Do You Want to Create a C.H.A.T.™ John M. Dankovich, JD, CLU®, ChFC®, <i>Wealth Coach / Member, MKD Wealth Coaches</i>	Pine
		Session #9: Family Collaboration & The Rivets™ Core Values Experience David R. York, Esq., CPA, <i>Fellow of the American College of Trust & Estate Counsel and Author of Entrusted</i> , and Trigena Halley, PCC, BCC, <i>Peak Performance CCT, LLC</i>	Spruce
		Session #10: Using DAFs to Create Collaboration and Increase Family Philanthropic Impact Laura J. Malone, CAP®, CEPA, <i>Vice President of Development, The American Endowment Foundation</i>	Fir
		Session #11: Collaborating with Clients to Increase the Influence of Your Services and Work Scott Farnsworth, Esq., CFP®, <i>Owner of SunBridge Network, President of Main Street Philanthropy</i>	Birch
12:00 pm	1:00 pm	Lunch	Taproom/Terrace
1:00 pm	2:00 pm	Innovation and Collaboration - How to Develop an Innovative Mindset and Increase Your Collaborative DNA Ian McDermott, <i>PPI Dean of Innovation & Learning, Founder and Chief Executive of International Teaching Seminars (ITS)</i>	Interlocken A
2:00 pm	2:50 pm	Shaking the Tree Film: The Big Payday	Interlocken A
2:50 pm	3:05 pm	Break	Interlocken Foyer
3:05 pm	5:00 pm	Shaking the Tree Collaborative Learning Experience: Small Multi-Disciplinary Collaborative Discussions with a Report Back and Wrap Up with Ian McDermott, James E. Hughes, Jr., Don Kozusko, and Melissa Mitchell-Blicht	Interlocken A

2016 Fusion Collaboration Plenary Sessions

What is Fusion And Our Hopes For What This Two Day Fusion Collaboration Experience Will Do For Your Practice

John “John A” Warnick, Esq., *Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook*

Tuesday, July 26th • 8:00 am – 8:30 am

Fusion and Collaboration come together at the Fusion Collaboration in a very unique way. Fusion is the formula for integrating the very best of legacy, relational, and philanthropic planning into the technical forms and structures of estate planning and transition planning. It requires a new mindset and skillset. Collaboration is multi-faceted and a key to unleashing Fusion. John A. Warnick will share our hopes for how the Fusion mindset and skillsets can transform your practice and invite you to embrace the Power of Collaboration.

Casting a Vision for Wealth and Its Purpose

David R. York, Esq., CPA, *Fellow of the American College of Trust & Estate Counsel and Author of Entrusted*

Tuesday, July 26th • 8:30 am – 9:30 am

Estate planning today is based on three fundamental assumptions. The first is that a person’s wealth can be summarized on a balance sheet. The second is that if transferring some financial wealth is good, then transferring more is better. The third is that the first place you should go to do your estate planning is an estate planner. What if all of these fundamental assumptions are actually all fundamentally wrong? This session will discuss what is wrong with the current estate planning model and how it can be fixed. It will discuss the importance of capturing and transferring human capital, how to maximize the benefits of financial wealth transfer, and what can be done with excess financial resources. It will also review the Seven Disciplines that successful families follow to effectively transfer holistic wealth on a multi-generational basis.

Preserving Family Values by Encouraging Social and Fiscal Responsibility with Modern Trust Structures i.e., Directed Trusts, Special Purpose Entities and Private Family Trust Companies

Al W. King, III, J.D., LLM, *Founder of South Dakota Trust Company and South Dakota Planning Company*

Tuesday, July 26th • 9:30 am – 10:30 am

Many wealthy clients’ main concern is to mentor their families to be aware of key family values and to be fiscally and socially responsible members of society. There is frequently a major disconnect with these desires and the client’s trust planning. This session will discuss some of the most powerful trust design strategies and techniques available to bridge this disconnect and to maximize a client’s and their family’s values, flexibility, control, asset protection, tax savings and privacy. Directed Trusts, Family Bank Dynasty Trusts, Special Purpose Entities/ Trust Protector Companies, Private Family Trust Companies, Purpose Trusts, etc. will all be discussed in detail with an emphasis on how they can assist with preserving family values in perpetuity. Do you know the names and values of your great grandparents?

The Best of Heckerling – The Ten Most Significant and Practical Ideas and Strategies from the 2016 Heckerling Institute on Estate Planning

Benetta P. Jenson, *Managing Director, J.P. Morgan Private Bank*

Tuesday, July 26th • 10:45 am - Noon

A 75-minute presentation highlighting the best ideas and hottest topics from the 2016 Heckerling Institute on Estate Planning. This is a wonderfully efficient way to catch up on the “Best of Technical” ideas and cutting-edge developments of significant interest.

2016 Fusion Collaboration Plenary Sessions

The Challenges of Collaboration

Courtney Pullen M.A., LPC, *President, Pullen Consulting Group*

Wednesday, July 27th • 8:15 am – 9:15 am

In painting a picture of collaboration you have trusted advisors working together seamlessly serving the best interest of the family. Seeing the value of what each member has to offer. But often, collaboration is missing because of its many challenges. In this interactive session we will discuss the stereotypes, pitfalls, how our own bias get in the way and what to do about it.

Courtney's presentation will be followed by a group of panelist who will discuss their hard earned wisdom about creating collaborative teams to better serve the needs of the affluent family.

The Journey of the Professional Advisor from the Perspective of a Masterful Collaborator

James E. Hughes, Jr. Interviewed by Timothy J. Belber, JD, AEP, *PPI Dean of Fusion* and John "John A" Warnick, Esq., *Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook*

Wednesday, July 27th • 9:15 am – 10:30 am

James E. "Jay" Hughes, author of *Family Wealth – Keeping It In The Family* and author or co-author of four other books which have significantly impacted planning for and service to legacy families and families in business, has spent a lifetime studying the best practices of flourishing families throughout the world. He has brought to us wisdom regarding the Shirtsleeves to Shirtsleeves in Three Generations, the five capitals which comprise a family's true wealth, and a new paradigm around trusts, trustees and beneficiaries. In this interview he will share with us lessons learned as well as suggestions on the value of working collaboratively and how to move from being an expert to becoming a master.

Innovation and Collaboration – How to Develop an Innovative Mindset and Increase Your Collaborative DNA

Ian McDermott, *PPI Dean of Innovation & Learning, Founder and Chief Executive of International Teaching Seminars (ITS)*

Wednesday, July 27th • 1:00 pm – 2:00 pm

Innovation and Collaboration are profoundly related. Both require patience, dedication, humility and the ability to see 'failure' as helpful feedback in disguise. An innovative mindset is key to letting go of the old habits which keep professionals siloed. It is also a well spring for the emergence of fresh solutions and conversations tailored to our client's needs. So often innovation takes place at the interface between disciplines. That means people from different backgrounds need to have a way of engaging effectively, making themselves understood and working to achieve a common goal. In other words, they need to know how to collaborate. Ian McDermott will be showing how by developing an innovative mindset you can increase your collaborative DNA.

Shaking the Tree Case Study Film – *The Big Payday*

Introduction by Don Kozusko, Esq., *Co-Founder of the Shaking the Tree Foundation, ACTEC Fellow and Senior Partner, Kozusko, Harris and Duncan*

Wednesday, July 27th • 2:00 pm – 2:45 pm

We are honored to present a case study learning experience through a short video presentation which features professional actors illustrating the visible and hidden dynamics of transition planning. *The Big Payday* is based on real situations which clients transitioning a business often face. This film was shown at the first annual Fusion Collaboration in March 2015 and at the Leadership Council of the National Association of Estate Planners and Councils (NAEPC) in November 2015. In response to feedback from our first Fusion Collaboration and other showings the script has been improved and filmed with new actors, providing a fresh experience for returning Fusion Collaboration participants.

2016 Fusion Collaboration Plenary Sessions

Shaking the Tree Collaborative Learning Experience

Wednesday, July 27th • 3:00 pm - 5:00 pm

After watching *The Big Payday* we will sit down in multi-disciplinary tables of eight. 90 minutes will be spent discussing questions which have been designed to amplify the collaborative learning experience. The first half of our multi-disciplinary collaborative discussions will focus on these themes: What went wrong with the McAllister family and its planning? What are the root causes for the poor outcome and unintended negative consequences of the planning? How could this outcome been avoided? The second half of the small roundtable discussions will focus on the possibility of remediation and flourishing. Assuming that all or most of the family members are open to the possibility of trying to put the pieces of their family's relational fabric back together again, how should we go about that? What type of collaboration might best serve the family? How would we work together to accomplish this result and what are the likely challenges we'll face and pitfalls we will want to avoid.

The final half hour of this **Shaking the Tree Collaborative Learning Experience** will bring a distinguished panel of highly collaborative practitioners, including Jay Hughes, Ian McDermott, Courtney Pullen and Melissa Mitchell-Britch together to share their insights. This is a unique and powerful learning experience you will not want to miss.



2016 Fusion Collaboration Breakout Sessions

Tuesday, July 26th

Planning Opportunities Using Domestic Trust Jurisdictions i.e. Alaska, Delaware, Nevada, New Hampshire, South Dakota & Wyoming

Al W. King, III, J.D., LLM, *Founder of South Dakota Trust Company and South Dakota Planning Company*

This session will discuss some of the most powerful trust design strategies and techniques available to maximize a client's flexibility, control, asset protection, tax savings

and privacy. The major boutique trust jurisdictions, i.e., Alaska, Delaware, Nevada, New Hampshire, South Dakota and Wyoming, will all be objectively compared and discussed. Some of the key and unique differentiator state statutes that will be analyzed include Directed Trusts, Special Purpose Entities/Trust Protector Companies, Dynasty Trusts, Domestic Asset Protection Trusts (DAPT), Purpose Trusts, private family trust companies, beneficiary quiet trusts, privacy, premium taxes, reformation/modification, decanting, international family statutes, etc.

2016 Fusion Collaboration Breakout Sessions

Purposeful Planning in the Transitioning of a Family Enterprise - Practical Tools for Designing Roadmaps and Building More Sustainable Technical Plans

John “John A” Warnick, Esq., *Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook*

Whether a founder is contemplating transitioning the family enterprise to rising generation family members or harvesting the wealth created, there is a huge opportunity for front-line advisors and family business consultants to assist in designing roadmaps and transition plans. Research conducted with over 700 members of families in business has shown that almost all founders/wealth creators wear the “15% Rose Colored Lens” when they consider the strengths and needs of their family and their family enterprise. Furthermore, this research has demonstrated that a more holistic view, including one that draws on the insights of all generations of the family as well as the outside advisors and non-family board members, is of great value in creating a roadmap for transitional and planning design and implementation. In this breakout session John A will share with us a powerful tool we can all use with our families in business as well as simple but powerful suggestions for integrating Purposeful Planning into your practice.

Family Advancement Sustainability Trust: Investing into Your Family Not Distributing to Your Family

Tom Rogerson, *Senior Managing Director and Family Wealth Strategist, Wilmington Trust*

Tom Rogerson’s goal in helping families to establish better communication and to define family values is to create a strong foundation. The next step towards developing a mature family governance process is to create a Family Advancement Sustainability Trust.

Families that have succeeded at preserving Family and Wealth for multiple generations generally have endowed pools of resources to invest in the family relations, development and advancement. These are not trusts to pay for education elsewhere, but trusts designed to educate. Many families are focused around the idea of defending a portfolio, but shouldn’t we also be defending the integrated estate plan and preparing the family for it all? In working closely with families, Tom often sees that families are more apt to endow a Chair at a university to educate strangers than to endow a Chair at the family table to educate the family. This can be done very simply and successfully with a Family Advancement Sustainability Trust. Tom can describe how a family can flourish through Family Relations, Family Purpose, and Family Philanthropy within a Family Advancement Sustainability Trust.

How Much is Enough - Questions, Conversations and Tools to Help Advisors and Consultants Lead Crucial Conversations with Their Clients

Timothy J. Belber, JD, AEP, PPI Dean of Fusion

Clients regularly confront wealth planning professionals with the question, “How much is enough to leave my children?”

Popular culture has been giving advice on this topic for decades: “Leave enough so the children can do anything but not so much that they don’t have to do anything.”

A real inheritance isn’t defined in financial terms. Rather, it’s supported by financial assets. You see, an inheritance is deeply entangled in the wealth owner’s legacy—in what people feel, think and say when they hear his name.

Join Timothy J. Belber, JD, AEP for a workshop where he will discuss a Four Step - Four Question Process for helping clients define a meaningful inheritance. Participants will leave with a tool they can use at their next client meeting.

2016 Fusion Collaboration Breakout Sessions

Bringing Purpose & Meaning to Trust Creation & Administration

Hartley Goldstone; *Principal of Trustscape LLC, Research Fellow at Wise Counsel Research Associates, and PPI Dean of the Trustscape*

Trusts offer control, tax advantages, privacy, and asset protection. These advantages can help make trusts the central vehicle for succession planning and family wealth transfer. However, trusts can also create complexities and conflicts for families.

Whether your clients are in the process of estate planning for the first time, or dealing with older trusts, this session will provide you with ideas, processes, and tools to help your clients' trusts have long-term positive impact on individuals, families, and the community. You will learn to help clients build strong relationships and define the trust-related responsibilities that each has to play towards the family's long-term success.

Content includes:

- Introduction to the concept of the “trustscape,” and how that will lead to better trust outcomes
- Surfacing clients' (and for that matter your) narratives about trusts as a means of reducing the likelihood of conflicts
- Ways to express purpose in and around trusts
- A new model for using trusts to develop independent and responsible beneficiaries
- And much more!



The Philanthropic Filter - A Tool to Maximize the Effectiveness of the Advisor's Efforts to Support the Philanthropic Vision of Our Clients and Ignite Their Philanthropic Passion

Randy A. Fox; *Founder, EzCharitable, LLC “The Generosity Company”, Editor in Chief, Planned Giving Design Center*

This session will focus on helping advisors identify entry points for engaging their clients in the philanthropic/legacy conversation. While many advisors want to have deep and meaningful conversations with their clients, they often find the conversation difficult to initiate. We will focus on various strategic avenues from which to launch the conversation.

Demystifying Life Insurance -- How It Works, What It Does, How to Make It Purposeful

Richard Harris, CLU, AEP, TEP, and John “John A” Warnick, Esq., *Founder of the Purposeful Planning Institute and Fellow of the American College of Trust & Estate Counsel and author of the Purposeful Trust & Gift Handbook*

Life insurance is perhaps the most talked about, least understood asset in our clients' portfolios. A recent survey of 4,000 Americans asked ten simple questions about life insurance. Most respondents answered five or fewer questions correctly. We will have an objective and highly qualified expert--Richard Harris serves on Trusts & Estates Magazine's advisory board as their life insurance guru--take us under the hood of the life insurance industry and help us understand how policies work and what works best in life insurance planning. And, John A. Warnick will offer two simple but powerful suggestions to help you make both life insurance and life insurance trusts Purposeful.

2016 Fusion Collaboration Breakout Sessions

Wednesday, July 27th

Do You Wanna Play Heads I Win, Tails You Lose, or, Do You Want to Create a C.H.A.T.™

John M. Dankovich, JD, CLU®, ChFC®, Wealth Coach / Member, MKD Wealth Coaches

Most professionals have sat in at least one conference presentation, attended at least one webinar and read at least one white paper or article on “Collaboration.” While many of these distribute sound philosophical conversation about what “Collaboration” is, few provide a specific example of how to implement a Collaboration Process that can be systematized and used across multiple client engagements.

John M. Dankovich, JD, ChFC, CLU, a founding member of MKD Wealth Coaches, LLC will share with you his C.H.A.T.™ (Closely Held Advisory Team) System for collaboration and how it has helped create synergy amongst advisors from differing professions to tap into and harness the collective wisdom of the group in support of their mutual client.

Participants will receive practical idea, templates for C.H.A.T.™ and other tools to help create effective collaboration teams.

Family Collaboration & The Rivets™ Core Values Experience

David R. York, Esq., CPA, Fellow of the American College of Trust & Estate Counsel and Author of *Entrusted*, and Trigena Halley, PCC, BCC, Peak Performance CCT, LLC

In business, we use a variety of tools and resources to learn how to intentionally foster greater communication and connection to accomplish the company’s goals and objectives. What if we applied that same level of focus in our families? Understanding our individual and shared Core Values can provide a strong foundation to build connection, cohesion and purpose. During this session you will learn about how

to use Rivets™ as a simple yet engaging tool to help you do just that. You will also learn how to use core values to create a jumping off point for a family vision statement and mission statement. After all, as Roy Disney said, “It’s not hard to make decisions once you know what your core values are.”

Using DAFs to Create Collaboration and Increase Family Philanthropic Impact

Laura J. Malone, CAP®, CEPA

Vice President of Development, The American Endowment Foundation

In recent years Donor Advised Funds have become so much more than a “poor man’s foundation”. They can be a phenomenal philanthropic tool that can foster collaboration among both the family and their advisory team. This collaboration can increase the beneficial impact to the family, their philanthropy, the advisors and the community at large. Join us while we review some past cases that can -

- Reveal questions to uncover if DAFs can create the right charitable pathway for clients, heirs and their trusted advisor to walk together.
- Teach examples of how parents and grandparents can facilitate giving opportunities that can be engaged and embraced by subsequent generations
- Debunk common myths when it comes to leveraging complex assets like real estate or closely held business interests for charitable giving.
- Create tax efficient planning strategies that can be inclusive and collaborative for both the family and the professional advisory teams.

2016 Fusion Collaboration Breakout Sessions

Collaborating with Clients to Increase the Influence of Your Services and Work

Scott Farnsworth, Esq., CFP®, *Owner of SunBridge Network, Co-Founder of Main Street Philanthropy*

In this session, Scott Farnsworth shares the most potent and successful tool in the SunBridge arsenal and teaches participants how to implement it immediately in their next client meeting. He explains

why this simple application is so effective and he provides empirical, third-party proof substantiating that it can in fact result in an average of four times more business and six times more referrals from every client. This is a hands-on, get “down-and-dirty” working session for financial advisors, attorneys, accountants, and related professionals. Every attendee will leave this mini-workshop equipped and qualified to put this remarkable idea to work the minute they get home.

Please check our website for updates and additional information.

Save the Date for 2017 for Fusion Collaboration: Tuesday, July 18th and Wednesday, July 19th, 2017