

# Conference Agenda

THE LOVINS GROUP

TRUSTEE ROUND TABLE 2017

---

TUESDAY, OCTOBER 24<sup>TH</sup>

**3:00 Registration and Coffee**

**4:00 Opening Session**

- Welcome and Vision for the Trustee Round Table
- Exploring the Grantor's Dream and the Job of Dealing with the Reality – Participatory Exercise

**5:00 Keynote Address**

- Hartley Goldstone – The Positive Story Project: Lessons Learned from Trustees of Family Trusts that Flourish Over Multiple Generations

**6:30 Cocktails & Community Building**

**7:30 Dinner – Topic-Based Discussions**

WEDNESDAY, OCTOBER 25<sup>TH</sup>

**7:30–8:30 Breakfast – Community Building**

**8:30–10:00 Program**

- Exploring the Hidden Sources of Tension in the Trustee/Beneficiary Relationship
- New Perspectives on “What Works” from a Seasoned Family Therapist
- Advanced Relationship Skills Development – Experiential Exercise

**10:30–12:30 Program**

- Inherent Pitfalls in the Distribution Function
- New Perspectives on Trust Distributions from Hartley Goldstone
- Empowering Dreams and the Personal Growth of Beneficiaries Through New Distribution Processes – Experiential Exercise

**12:30–1:30 Lunch – Community Building**

**1:30–2:30 Program**

- Tapping the Wisdom of the Round Table Community to Address Your Most Pressing Trustee Questions – Facilitated Discussion

**2:30–3:30 Program**

- The Value of Building a Compelling Vision – Demonstration of a Co-Creation Process in the Context of Our Round Table Community

**3:30–4:00 Closing Round**