21/64®

TRAINING.

21/64's original two-day training and ongoing network helps you acquire the personal skills, generational awareness, and technical tools to work more effectively with next-generation funders and multigenerational family enterprise clients.

At this interactive training you will learn 21/64's proven methodology for engaging individuals, families, and institutions at the intersection of values and governance. The program is specifically designed to help you more comfortably engage donors and clients in important and often complicated conversations, whether you are new to the field or a seasoned advisor taking your work to the next level.

Once you've completed the 101 Training you are eligible to join our network of over five hundred 21/64 Certified Advisors and have access to continued skill building, next level trainings, the latest resources, and peer connectivity.

101

Multigenerational Training

October 24-25, 2017
NYC

Who Should Attend

- Philanthropic Advisors
- Community Foundation Professionals
- Investment Advisors, Private Bankers, and Estate Attorneys
- Family Office Professionals
- Foundation Directors
- Trustees who also staff their family philanthropy

"This was the best training and workshop experience I've ever attended. Every minute was meaningful".

Hayley Wasser, Associate Director, United Way of the Battle Creek & Kalamazoo Region

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AGENDA.

Day One

9am-5pm

Welcome & Overview

Personal Tools

- How We Bring Ourselves To Our Work With Families
- Training On *Leadership Tools for Change* Series

Generational Tools

- Using the Generations as a Lens For Multigenerational Consulting
- Training on Generational Tools, including:
    - Generational Personalities
    - Motivational Values Cards
    - Picture Your Legacy
    - Money Messages
    - *Engaging the Next Generation* Case Study

Day Two

8:30am-3:30 pm

Turning Theory Into Practice: How We Administer the Work

Implementing Stages of the Action Research Method

- Entry and Contracting
- Data Collection
- Feedback
- Planning
- Intervention
- Evaluation

Resources, Evaluation, and Next Steps

Benefits for Participants

- Understand assumptions around family, wealth, and philanthropy
- Learn to facilitate and implement 21/64 tools
- Discuss best practices in facilitation skills
- Apply group dynamics and group process skills
- Personal development and use of self as an agent of change
- Acquire research and resources on engaging the next generation
- Interact in small groups and connect to diverse participants

Benefits Following the Training

- Tap into a unique network of professionals
- Receive resources and the latest articles and research
- Complimentary 30 minute post training coaching call
- Add 21/64 Certified Advisor to your credentials
- Join next level trainings such as Managing Family Dynamics, Talking About Money, and a Facilitation Master Class
- Join quarterly webinars for continued practice and skill building
- Get notifications for job opportunities referrals
- Enjoy a 20% discount on tools

21/64®

REGISTRATION.

Training Dates: October 24-25, 2017

Name: ______________________________

Email: ______________________________

Title: ______________________________

Organization: ______________________________

Address: ______________________________

City, State, Zip: ______________________________

How did you hear about us? ______________________________

Dietary Restrictions: ______________________________

DRINKS AND NETWORKING will immediately follow the first day of the training at 5:00 pm

RSVP ☐ yes ☐ no ☐ not sure yet

Please email your bio and headshot to Barbara@2164.net, and include your organization name with your bio. You will receive a pre-training email with a detailed agenda, participant and facilitator bios, short pre-reading, and additional logistics approximately two weeks prior to the training. Hard copy materials and tools will be distributed in-person.

Payment and Fees

Workshops are limited to 25 participants and fill on a first-come first-serve basis. Fees include the workshop, all tools and materials, two (2) breakfasts, two (2) lunches, ongoing professional development and network membership.

For-Profit Professional	Non-Profit Professional	Freelance Professional
$2,960	$2,450	$1,840

Payment can be made online with credit card at www.2164.net, or mail a check to:

21/64
445 Park Avenue, 16th Floor
New York, NY 10022
Attn: Barbara Taylor

Cancellation: We understand life happens. If you cancel more than 60 days prior to a scheduled training, your registration will be refunded in full. If your cancellation is 30-60 days prior your registration be refunded 50%. All cancellations within 30 days of the training are nonrefundable. We will try to take into account any extenuating circumstances that result in cancellation and may allow your fee to be applied to a future training within 12 months. We cannot guarantee fee postponement beyond 12 months of the originally planned training.

Hotel Recommendations: email Krystal@2164.net
Other Questions? email Barbara@2164.net

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"21/64 tools have increased my ability to dive deeper with donors and particularly families with multiple generations at the table. The training is dynamic, fresh, and very full of interactive experiences and moments for personal and professional reflection. As an organization, we have benefitted from both the 21/64 Certification as well as continued relationship with the 21/64 staff".

Kim Wright, Director of Philanthropic Services, The Seattle Foundation

"The 21/64 training was one of the best uses of my time and resources for my business of advising wealthy families. I have used several of the tools to help deepen the relationships I have with the families I serve. I cannot recommend 21/64 enough if you are looking for new and value-added ways to serve your clients and their families in their philanthropy."

Charlie Jordan, Partner/Wealth Advisor, Brightworth

"I highly recommend this training, even if you are quite experienced in family meeting facilitation and client management. In addition to providing outstanding content, the training works on almost a meta level – not only are you covering the toolkits and techniques for facilitating family meetings in detail, but in addition you are able to observe skilled facilitators demonstrate these techniques in action as they work with the group. A highly valuable use of time!"

Coventry Edwards-Pitt, Chief Wealth Advisory Officer, Ballentine Partners, LLC