

# 2023 Editorial Calendar

## DOMAIN CONNECTION LEGEND

- Financial & Investment Management
- Estate Planning & Legal Issues
- Social Impact & Philanthropy
- Risk Management
- Family-Advisory Relationships
- Health & Well-Being
- Family Dynamics
- Learning, Development & the Rising Generation
- Leadership & Transition Planning
- Governance & Decision-making

January	February	March	April
<b>Succession</b>	<b>DEI- Diversity, Equity &amp; Inclusion</b>	<b>Education Beyond the Next Gen</b>	<b>Family Dynamics</b>
Quarterly Newsletter	2/8 <span style="color: blue;">◆</span> Practice Management Clinic	3/8 <span style="color: blue;">◆</span> Practice Management Clinic	Quarterly Newsletter
1/11 <span style="color: blue;">◆</span> Practice Management Clinic	 	3/16 <span style="color: cyan;">○</span> Roundtable	4/12 <span style="color: blue;">■</span> Collegium
1/19 <span style="color: cyan;">○</span> Roundtable		Domains 	 
TBD <span style="color: cyan;">□</span> Study Group			
 		 	 
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May	June	July	August
<b>Investing in Your Health</b>	<b>The Evolving Client</b>	<b>Estate Planning &amp; Governance</b>	<b>The New Allocation</b>
5/10 <span style="color: blue;">◆</span> Practice Management Clinic	6/14 <span style="color: blue;">◆</span> Practice Management Clinic	Quarterly Newsletter	8/9 <span style="color: blue;">◆</span> Practice Management Clinic
5/18 <span style="color: cyan;">○</span> Roundtable	 	7/12 <span style="color: blue;">◆</span> Practice Management Clinic	 
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TBD <span style="color: cyan;">□</span> Study Group		TBD <span style="color: cyan;">□</span> Study Group	
		 	
		Domains 	
September	October	November	December
<b>Family-Owned Enterprises</b>	<b>Social Impact &amp; Philanthropy</b>	<b>The UHNW Symposium, 2023</b>	<b>Leadership &amp; Legacy</b>
9/21 <span style="color: cyan;">○</span> Roundtable	Quarterly Newsletter	11/8 <span style="color: blue;">◆</span> Practice Management Clinic	12/7 <span style="color: cyan;">○</span> Roundtable
9/27 <span style="color: blue;">■</span> Collegium	10/11 <span style="color: blue;">◆</span> Practice Management Clinic	11/16 <b>Symposium</b> An annual two-day event with thought-provoking topics presented by industry experts. Includes panel and group discussions to promote learning and collaboration.	12/13 <span style="color: blue;">◆</span> Practice Management Clinic
 	TBD <span style="color: cyan;">□</span> Study Group		 
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# Calendar Key

## **SYMPOSIUM**

An annual two-day event focused on several thought-provoking topics presented by industry experts. Includes panel discussions and discussion groups to promote learning and collaboration.

## **COLLEGIUM**

A biannual program to promote peer-to-peer idea sharing on a singular, thought-provoking practice management topic. Geared towards operating principals, the program uses facilitator-led, small-group breakouts, followed by a session with reports from the breakouts.

## **PRACTICE MANAGEMENT CLINICS**

Monthly virtual deep dives meant to explore the group's priorities among the building blocks of practice management, to build new skills and operationalize best practices.



## **UHNW EXCLUSIVE CONTENT**

Content aligned with UHNW events providing insight into The Ten Domains and Institute initiatives with articles, white papers, a blog series, interviews, reviews, news, guest posts, plus in-person, virtual and hybrid events, podcasts and webinars.

## **ROUNDTABLE**

In-person and virtual panel discussion with experts held every other month to offer expertise and experience, providing attendees best practices and a valuable learning experience. Discussions include Q&A time.

## **STUDY GROUPS**

A series of quarterly, small-group discussions centered on the practical application of the Ten Domains, particularly high-interest topics to promote learning and collaboration across domains.



## **UHNW COMMUNITY FORUM**

An exclusive 24/7 member discussion platform for peer exchange, sharing insight and thought leadership, posing pertinent questions to our trusted colleagues and opportunities to extend the dialogue from previous events and shared content.