

2023 Program 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
Succession	DEI- Diversity, Equity & Inclusion	Education Beyond the Next Gen	Family Dynamics
Quarterly Newsletter	2/8 Practice Management Clinic	3/8 Practice Management Clinic	Quarterly Newsletter
1/11 Practice Management Clinic	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>	3/16 UHNW Institute Masterclass	4/12 Practice Management Clinic
1/19 Roundtable		TBD Study Group	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>
TBD Study Group			<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>
<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>			
May	June	July	August
Investing in Your Health	The Evolving Client	Estate Planning & Governance	The New Allocation
5/10 Practice Management Clinic	6/14 Practice Management Clinic	Quarterly Newsletter	8/9 Practice Management Clinic
5/18 Roundtable	TBD UHNW Institute Masterclass	7/12 Practice Management Clinic	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>
<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>	7/20 Roundtable	
		TBD Study Group	
		<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>	
September	October	November	December
Family-Owned Enterprises	Social Impact & Philanthropy	The UHNW Symposium, 2023	Leadership & Legacy
9/21 Roundtable	Quarterly Newsletter	11/8 Practice Management Clinic	12/7 Roundtable
9/27 Collegium	10/11 Practice Management Clinic	<div style="text-align: center;"> ★ 11/16 Symposium An annual two-day event with thought-provoking topics presented by industry experts. Includes panel and group discussions to promote learning and collaboration. </div>	12/13 Practice Management Clinic
TBD UHNW Institute Masterclass	TBD Study Group		<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>
<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> </div> <div style="text-align: center;"> Domains </div> </div>

Calendar Key



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.



THE UHNW INSTITUTE PODCAST

The UHNW Institute Podcast, a monthly podcast dedicated to UHNW firms, advisors and the families they serve.



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.



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.



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.



THE UHNW INSTITUTE MASTERCLASS

The UHNW Institute Masterclass Series, A skills-based, quarterly, 90-minute, virtual course on topics requested by membership, with engaging break-out sessions for hands-on learning.



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.