

## 2023 **Program** Calendar

#### DOMAIN CONNECTION LEGEND

- Financial & Investment Management
- Estate Planning & Legal Issues
- Social Impact & Philanthropy
- Risk Management
- Family-Advisory Relationships

- - Family Dynamics Learning, Development & the Risina Generation
- Leadership & Transition Planning
- Governance & Decision-making

**J**ANUARY MARCH APRIL **FEBRUARY** 

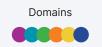
Health &

Well-Being

#### Succession **Quarterly Newsletter** 1/11 Practice Management Clinic 1/19 Roundtable **TBD** Study Group **Domains**

# **DEI- Diversity, Equity & Inclusion**

## Practice Management Clinic







JULY





**Domains** 





Practice Management Clinic

**Family Dynamics** 

**Quarterly Newsletter** 

**A**UGUST

The New Allocation

Study Group

4/12

**TBD** 

### **Investing in Your Health** Practice Management Clinic 5/10 5/18 Roundtable **Domains**

MAY



JUNE



Study Group

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**TBD** 





SEPTEMBER

**O**CTOBER

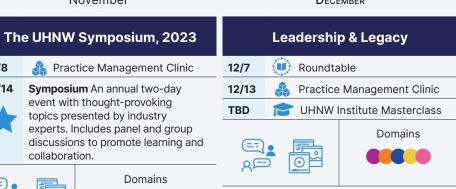
November	DECEMBER
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Family-Owned Enterprises		
9/13	Practice Management Clinic	
9/21	Roundtable	
TBD UHNW Institute Masterclass		
Domains		





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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.



#### **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.



#### 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.



#### **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 PODCAST

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



#### 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 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.



#### **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.

The Institute is a non-profit, 501(c)(3) educational organization that is committed to educating its members, fostering positive and sustainable change in the wealth management industry, and operating as in independent and objective resource that avoids conflicts of interest or creating the appearance of a "pay-to-play" organization. Member and participant views, information and opinions expressed through posts, and content presented in programming and events do not necessarily express, reflect or represent the views of The UHNW Institute.