

# 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
<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  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;"> <b>Domains</b>   </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;"> <b>Domains</b>   </div> </div>
TBD  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  Practice Management Clinic	6/14  Practice Management Clinic	Quarterly Newsletter	SUMMER READING LIST
5/18  Roundtable	6/28  UHNW Institute Masterclass	7/20  Roundtable	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;">  </div> <div style="text-align: center;"> <b>Domains</b>   </div> </div>
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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>
9/13  Practice Management Clinic	Quarterly Newsletter	11/8  Practice Management Clinic	12/7  Roundtable
9/21  Roundtable	10/11  Practice Management Clinic	<div style="text-align: center;">  </div>	12/13  Practice Management Clinic
TBD  UHNW Institute Masterclass	10/3  Collegium		11/14 <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.
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# 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.