

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 Risina Generation

4/12

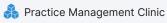
TBD

- Leadership & Transition Planning
- Governance & Decision-making

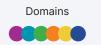
JANUARY MARCH APRIL **F**EBRUARY

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

DEI- Diversity, Equity & Inclusion







Education Beyond the Next Gen Practice Management Clinic

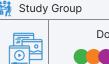




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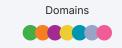
Domains



Family Dynamics

Quarterly Newsletter

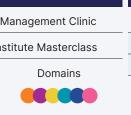
Practice Management Clinic



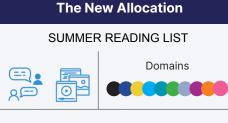
JULY JUNE **A**UGUST MAY

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







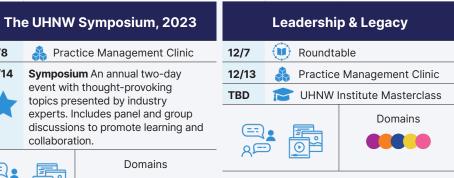


SEPTEMBER **O**CTOBER November **DECEMBER**

Family-Owned Enterprises			
9/13	Represent Clinic		
9/21 Roundtable			
TBD	LILINIA/ In atitute Mesterologe	10	
IBD	UHNW Institute Masterclass	TE	
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Social Impact & Philanthropy				
Quarterly Newsletter				
10/11	A Practice Management Clinic			
10/3	Collegium			
TBD	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.



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.