

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

Family Dynamics

Quarterly Newsletter

Study Group

Practice Management Clinic

Governance & Decision-making

January February March April

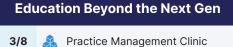


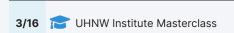


















4/12

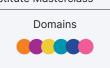
TBD



July August June May

Investing in Your Health				
5/10	Practice	Management Clinic		
5/18	Roundta	ble		
		Domains		
		000000		





Estate Planning & Governance Quarterly Newsletter

7/12		Practice Management Clinic
7/20	(1)	Roundtable
TBD		Study Group





The New Allocation				
Summer Reading List				
ALL OF	Domains			

October September November December

11/8

11/14

Family-Owned Enterprises			
9/13	Practice Ma	anagement Clinic	
9/21	Roundtable		
9/27	UHNW Institute Signature Event		
AD O		Domains	

Social Impact & Philanthropy

Quarterly Newsletter				
10/3	Collegium	n		
10/11	A Practice Management Clinic			
10/18	Webinar			
TBD	Study Group			
<u></u>		Domains		



The UHNW Symposium, 2023

Symposium An annual two-day event with thought-provoking topics presented by industry experts. Includes panel and group discussions to promote learning and collaboration.

Representation of the Practice Management Clinic of the Practice Management Clinic of the Practice of the Prac



Leadership & Legacy









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.



WEBINARS

Virtual panel discussions with experts held periodically to offer expertise and experience, providing attendees with best practices and a valuable learning experience.



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.



THE UHNW INSTITUTE PODCAST

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



UHNW INSTITUTE SIGNATURE EVENT

Special events hosted throughout the year that range from membership networking events to exclusive partnered get-togethers to support our growing community.



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.