

# 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		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>		<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;">  </div> <div style="text-align: center;"> <b>Domains</b>   </div> </div>		
<b>Investing in Your Health</b>		<b>The Evolving Client</b>		
5/10  Practice Management Clinic	6/14  Practice Management Clinic	Quarterly Newsletter		
5/18  Roundtable	6/28  UHNW Institute Masterclass	7/12  Practice Management Clinic	Summer Reading List	
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<b>Family-Owned Enterprises</b>		<b>The UHNW Symposium, 2023</b>		
9/13  Practice Management Clinic	Quarterly Newsletter		11/8  Practice Management Clinic	
9/21  Roundtable	10/3  Collegium	<div style="text-align: center;">  <p><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.</p> </div>	12/7  Roundtable	
9/27  UHNW Institute Signature Event	10/11  Practice Management Clinic		12/13  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>			TBD  UHNW Institute Masterclass	
<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;">  </div> <div style="text-align: center;"> <b>Domains</b>   </div> </div>		<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;">  </div> <div style="text-align: center;"> <b>Domains</b>   </div> </div>		
<b>Social Impact &amp; Philanthropy</b>		<b>Leadership &amp; Legacy</b>		

# 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.



## **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 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 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 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.