



The
UHNW
Institute

Resource Toolkit

Collaboration Edition



Podcasts



How Estate Planners and Other Advisors Work Together and Still Keep Communications Privileged

ACTEC Foundation

An examination of privilege in the estate planning context, focusing particularly on communications between team members.



Articles

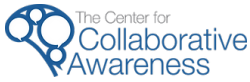
Forbes

The 7 Things Great Teams Execute Flawlessly

by Glenn Llopis

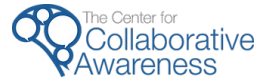
Seven ways successful teams stay intact and find their rhythm throughout development and success.

continued on next page



The Blueprint of We

A design document that captures who you are, why you're in and what you want to do together.



The Business Case for Collaboration

Smart collaboration generates profits, loyalty, talent and innovation. So, what are you waiting for?



Eight Ways to Build Collaborative Teams

Even the largest, most complex teams can work together effectively if the right conditions are in place.



A Process to Build High-Performance Teams

How do you build a high-performing team? Even the clearest business vision is lost without the right people.



The Rise of the Integrated Advisor

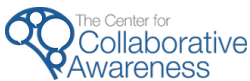
Examine the complexity of the "Integrated Advisor" role and gain a better understanding of the concept.

*Only members of The UHNW Institute can access the link after logging into the member portal [here](#).



The Secrets of Great Teamwork

Collaboration has become more complex, but success still depends on the fundamentals of group collaboration.



We Are Wired to Connect: The Neuroscience of Collaboration

Our brains have two functions: growth and protection. Society prioritizes the latter, limiting creativity and resilience.



What Google Learned From Its Quest to Build the Perfect Team

New research reveals surprising truths about why some work groups thrive and others falter.



White Papers



The UHNW Institute

Achieving Best-in-Class Integration in Wealth Management *by Joe Calabrese*

Embracing and achieving integration in UHNW services are increasingly important areas of discussion for families and firms.

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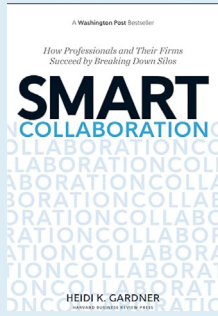
charles SCHWAB

The Multi-Family Office of Tomorrow—Simplifying Complexity for Families of Significant Wealth *by Schwab Advisor Family Office*

This white paper offers a comprehensive, in-depth look at the current state of the multi-family office (MFO) industry as of 2023.



Book List



Smart Collaboration: How Professionals and Their Firms Succeed by Breaking Down Silos

by Heidi K. Gardner

Professional service firms face a serious challenge. Their clients increasingly need them to solve complex problems.



Center for Collaborative Awareness

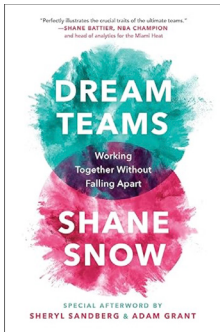
A series of books on the brain and collaboration



Collaboration Is the New Competition: Why the Future of Work Rewards a Cross-Pollinating Hive Mind & How Not to Get Left Behind

by Priscilla McKinney

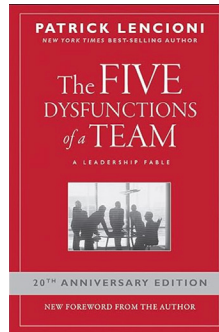
Without true collaboration, businesses will not survive. Mastering this new way of working requires a mindset shift and initiative to act.



Dream Teams: Working Together Without Falling Apart

by Shane Snow

The counterintuitive reasons why so many partnerships and groups break down--and why some breakthrough.

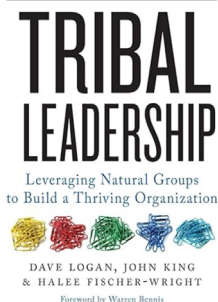


The Five Dysfunctions of a Team

by Patrick Lencioni

The New York Times best-selling team leadership handbook for modern executives, managers and organizations.

NEW YORK TIMES BESTSELLER



Tribal Leadership

by Dave Logan, John King and Halee Fischer-Wright

An essential tool to help managers and business leaders take better control of their organizations by utilizing the unique characteristics of the tribes that exist within.



Wealth 3.0: The Future of Family Wealth Advising by Institute Faculty

Members: James Grubman, PhD, Dennis T. Jaffe, PhD, and Kristin Keffeler MAPP

Challenges family wealth advising to become the enduring, scalable, rigorous profession it was always destined to be.



Tools



Effective Collaboration: A Pillar of Integrated Wealth Management

Findings and recommendations that can be used to enhance collaboration and integration by advisory firms.



The Good Collaboration Toolkit

A collection of materials designed to help individuals and groups develop and nurture effective collaborations.



The Value Sort Tool

An excellent way to reflect upon what is most important to you personally and a great way to stimulate conversations.