



2024 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

Collaboration: Strategic Planning

Quarterly Newsletter

1/17 Practice Management Clinic

1/25 UHNW Institute Masterclass



February

D,E, Inclusion,...L,G,B,T,Q...

2/8 Webinar

2/15 Emerging Leaders Mentorship



March

The Language of Wealth

3/7 Roundtable

3/13 Practice Management Clinic



April

FinTech

Quarterly Newsletter

4/4 Webinar

4/18 FinTech Forum, FWR

4/24 Virtual Collegium



May

Investment

5/8 Practice Management Clinic

5/9 Roundtable

5/16 Emerging Leaders Mentorship



June

Trust

6/5 Cybersecurity & AI Summit, FWR

6/6 Webinar

6/20 UHNW Institute Masterclass



July

Legal Implications of Wealth 3.0

Quarterly Newsletter

7/10 Practice Management Clinic

7/11 Roundtable



August

UHNW Lifestyle

Summer Reading List

8/15 Emerging Leaders Mentorship



September

Family Enterprise: Back to Business

9/5 Roundtable

9/11 Practice Management Clinic



October

The New Philanthropy

Quarterly Newsletter

10/3 UHNW Institute Masterclass

10/7-8 Collegium

10/10 FinTech Summit, FWR



November

UHNW Institute Symposium

11/7 Webinar

11/13-14 In-person Symposium



December

Dynamic Role Play

12/5 Roundtable

12/12 Emerging Leaders Mentorship



Calendar Key



Collegium

A biannual program designed to promote peer-to-peer idea sharing on a singular, thought-provoking topic relating to practice management issues. The program is geared towards operating principals and uses facilitator-led, small-group breakouts, followed by a general session with reports from the breakouts.



Practice Management Clinic

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. *Scheduled on a Wednesday every other month.**



Webinars

Evergreen or timely, virtual panel discussions with experts held periodically to offer expertise and experience, providing attendees with best practices and a valuable learning experience. Lunchtime, live audience and pre-recorded speaker/panelist options.



The UHNW Institute Podcast

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



UHNW Institute Emerging Leaders Cohort & Mentorship Program

A 4-part learning cohort with training program for the emerging leaders within Institute member firms. This intimate group of firm-appointed candidates meets quarterly for a year and includes at least one in-person optional meet-up event to network and support connection.



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

A panel discussion with in-house and outside experts offering real-life expertise and experience, providing attendees with best practices and a valuable learning experience. Discussion includes time for Q&A. *Scheduled 5-6 times a year from 4-5:30 p.m.**



Study Groups

Quarterly discussion groups centered on high-interest topics to promote learning and collaboration across domains. *Schedules vary depending upon the Study Group.**



The UHNW Institute Masterclass

A skills-based, quarterly, 90-minute virtual course on topics requested by membership, with engaging breakout sessions for hands-on learning. *Scheduled 3 times a year January (5:00 – 6:30p.m. ET), June & October (4 – 5:30p.m. ET)**



UHNW Institute Signature Event

UHNW Institute special events hosted throughout the year 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.