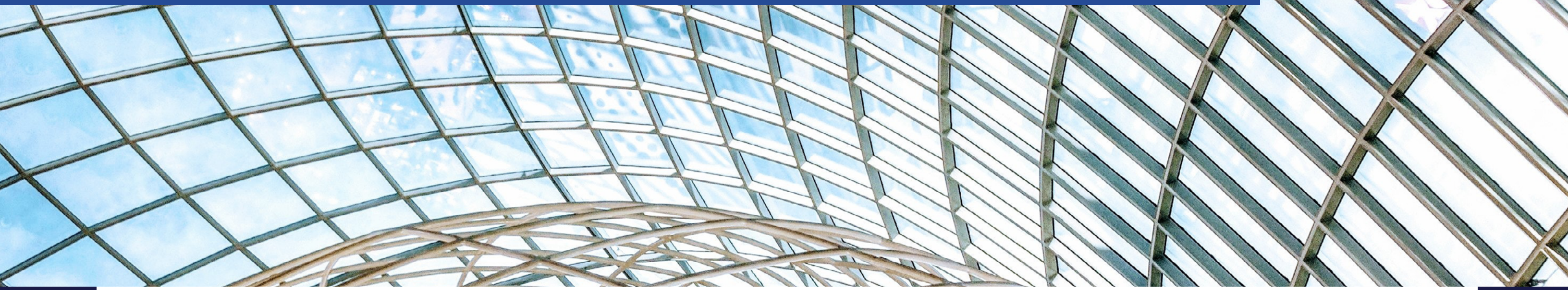
The
UHNW
Institute

Resource Toolkit

February 2024 | Inclusion Toolkit



Articles

Financial Planning

Featured

How a Multi-Family Office is Creating a Diverse Talent Pipeline

by Victoria Zhuang

This article lauds the importance and benefits of industry hiring fairs that focus on engaging diverse talent within their fields.

CRAIN CURRENCY

Family Offices Forge Ahead with DEI Initiatives Despite Criticism

Undeterred by recent political backlash against diversity, equity, and inclusion programs, family offices continue to prioritize these initiatives.

FA FINANCIAL ADVISOR

Why are More Women Clients Than Ever Firing Advisors

The financial advisor industry is facing criticism for failing to listen to women investors, leading to increased dissatisfaction and disengagement among female clients.

Forbes

How to Give Women A Bigger Voice in Managing Family Wealth

The wealth management industry faces a gender gap with a significant proportion of women set to inherit fortunes but lacking representation in decision-making roles.

Inclusion in the Workplace and 6 Reasons Why It Matters

Discover six impactful areas that highlight the significance of inclusion in the workplace and how prioritizing it can contribute to organizational success.

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The Power of Women in Family Business: A Generational Shift in Purpose and Influence

Women's roles in family business leadership, succession, and management is changing - and so are the biases that influence them.

Culture Clash

Expanding on the authors' 2015 book, *Cross Cultures*, this article focuses on the advisory skills needed to understand the cultural perspectives of the world's major cultural prototypes and how these impact UHNW families.

Millennials and the Family Office

Family offices, often designed with Baby Boomers in mind, must be able to adapt to a new wave of affluent millennials to continue to thrive.

Modern (Big) Love

This article summarizes several key issues and recommendations when a cohabitation relationship may coexist with an ongoing (but separated) marital relationship.

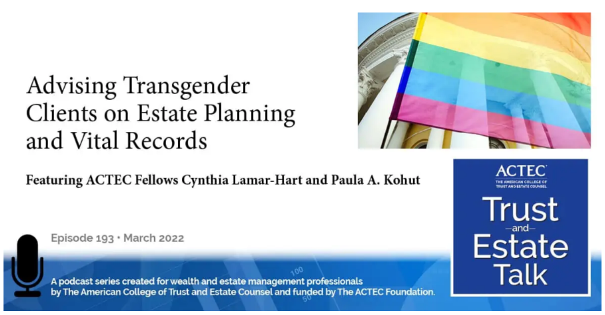
Podcasts

Featured

Episode 84: Understanding Identity and Social Power

Wealth of Wisdom Podcast

Tom McCullough talks with Kofi Hope and Zahra Ebrahim about the Identity Wheel, a tool that helps individuals explore different dimensions of their identity and understand the power dynamics connected to them.



Episode 193: Advising Transgender Clients on Estate Planning and Vital Records

The American College of Trust and Estate Counsel

Discussing the many actions and issues involved in estate planning and end-of-life decisions that arise with transgender clients and their families.

Conversations on Black Wealth

Ballentine Broadcast Podcast

Ellie Diop, owner of Ellie Talks Money, shares best practices and simple tips on how to become an entrepreneur, with a focus on supporting Black female-owned businesses.

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Episode 7: Building Acceptance: Transforming Families and Workplaces With Rebecca Sanborn, J.D.

The Rainbow Bull Podcast

Rebecca, the founder and president of Sanborn Diversity Training Solutions, LLC, shares her personal journey and how her experiences have propelled her to advocate for a world where acceptance thrives in families and workplaces alike.

Reports

Reaching and Retaining the Female Investor: Closing the Gender Gap of Advice

The face of investing has changed. Less than a generation ago, women were undeniably in the minority of investment decision–makers; but now, with the risk of meeting retirement needs transferring from the employer to the employee, women are more likely to bear the responsibility for their household investment portfolio.

Tools

accessiBe

Making the internet accessible and inclusive to millions of users.

Project Implicit

Project Implicit scientists produce high-impact research that forms the basis of our scientific knowledge about bias and disparities.

Privilege/Identity Wheel

An evolving tool to help us better map out the different dimensions of our social identities by allowing us to better understand how our identities shape experiences across all dimensions.