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## 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>Collaboration: Strategic Planning</b>	<b>Inclusion: Understanding Your Client</b>	<b>The Language of Wealth</b>	<b>FinTech</b>
Quarterly Newsletter	2/15  Emerging Leaders Mentorship	3/13  Practice Management Clinic	Quarterly Newsletter
1/17  Practice Management Clinic	2/29  Webinar	3/28  Roundtable	4/4  Webinar
1/25  UHNW Institute Masterclass	   	  	4/18  FinTech Forum, FWR
   			4/24  Virtual Collegium
			   
MAY	JUNE	JULY	AUGUST
<b>Investment</b>	<b>Trust</b>	<b>Wealth, Law and Collaboration</b>	<b>UHNW Lifestyle</b>
5/8  Practice Management Clinic	6/4  Cybersecurity & AI Summit, FWR	Quarterly Newsletter	Summer Reading List
5/30  Roundtable	6/12  Member Reception	7/10  Practice Management Clinic	8/15  Emerging Leaders Mentorship
   	6/20  UHNW Institute Masterclass	7/16  Emerging Leaders Mentorship	  
	6/27  Webinar	7/18  Roundtable	
	  	  	
SEPTEMBER	OCTOBER	November	DECEMBER
<b>Family Enterprise: Back to Business</b>	<b>The New Philanthropy</b>	<b>UHNW Institute Symposium</b>	<b>Dynamic Role Play</b>
9/11  Practice Management Clinic	Quarterly Newsletter	11/13  FO Investment Summit, FWR	12/5  Roundtable
9/26  Roundtable	10/3  UHNW Institute Masterclass	11/13-14  In-person Symposium	12/12  Emerging Leaders Mentorship
   	10/7-8  Collegium	  	  
	10/10  FinTech Summit, FWR		
	  		

# 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

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.