






















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	FEBRUARY	MARCH	APRIL
Collaboration: Strategic Planning	Inclusion: Understanding Your Client	The Language of Wealth	FinTech
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
Investment	Trust	Wealth, Law and Collaboration	UHNW Lifestyle
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	
	6/20 UHNW Institute Masterclass	7/16 Emerging Leaders Mentorship	
	6/27 Webinar	7/18 Roundtable	
SEPTEMBER	OCTOBER	November	DECEMBER
Family Enterprise: Back to Business	The New Philanthropy	UHNW Institute Symposium	Dynamic Role Play
9/11 Practice Management Clinic	Quarterly Newsletter	11/13 FO Investment Summit, FWR	12/5 Roundtable
9/17 Emerging Leaders Mentorship	10/7-8 Collegium	11/13-14 In-person Symposium	12/10 Signature Event
9/26 Roundtable	10/10 FinTech Summit, FWR		12/12 Webinar
	10/24 Roundtable		12/12 Emerging Leaders Mentorship

-  1.17.24 - Practice Management Clinic - Human Capital
-  1.25.24 - The UHNW Institute Collaboration Masterclass
-  2.29.24 - Understanding Your Clients: Viewing DEI from the Lens of Inclusion First
-  3.13.24 - The Language of Wealth
-  3.28.24 - Practice Management Clinic - Human Capital
-  4.4.24 - The Corporate Transparency Act: Managing Significant Challenges Faced by Families, Family Offices, and Advisors
-  4.24.24 - Virtual Collegium: Client Segmentation
-  5.8.24 - Practice Management Clinic - Sales and Marketing
-  5.30.24 - The Outsized Impacts of Family Goals in Investing
-  6.20.24 - The UHNW Institute Conflict Masterclass - Part 1
-  6.27.24 - Building Advisory Skills with Nontraditional Clients and their Families: How to Approach LGBTQ+ Issues with Sensitivity & Courage
-  7.10.24 - Practice Management Clinic - Business Management
-  7.18.24 - Wealth 3.0 Lawyering – How to be an Integrated Attorney
-  9.11.24 - Practice Management Clinic - Technology
-  9.26.24 - The Evolving Family Enterprise
-  10.8.24 - In-person Collegium: Defining and Achieving Business Sustainability
-  10.24.24 - Research from the Philanthropy and Social Impact domain to support practice, education, and training
-  11.14.24 - The 2024 UHNW Institute Symposium - The Future of Family Wealth Advising: Positioning Your Firm for Success
-  12.5.24 - Roundtable TBA
-  12.10.24 - Signature Event TBA
-  12.12.24 - Building Advisory Skills with Nontraditional Clients and their Families: Wealth Creation and Stewardship Domains

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.