

# 2025 PROGRAM CALENDAR

<b>JANUARY</b> Strategic Planning for the New Year: Getting your House in Order		<b>FEBRUARY</b> Integrated Wealth		<b>MARCH</b> Beneficiary Stories		<b>APRIL</b> Financial & Investment Management	
1/8	Podcast: Risk Management	2/5	Podcast: Risk & Preparedness with Paul Violis	3/5	Podcast	4/2	Podcast
		2/6	Webinar: Successful Components for Hiring	3/6	Roundtable - Beneficiary Stories Initiative	4/3	Webinar - DEI Series Part III
		2/12	Practice Management Clinic - Human Capital	3/12	Practice Management Clinic - Service	4/23	Collegium
				3/19	Emerging Leaders Mentorship	4/24	Signature Event - FinTech Forum
						4/30	Signature Event - Advancing Female Family Wealth Leaders
		2/24 - Live Member Orientation 12pm ET				4/28 - Live Member Orientation 12pm ET	
<b>MAY</b> Health & Well Being		<b>JUNE</b> The Single Family Office		<b>JULY</b> Estate Planning & Legal Issues		<b>AUGUST</b> Summer Break	
5/1	Signature Event - Advancing Female Family Wealth Leaders	6/4	Podcast	7/2	Podcast	UHNW Summer Reading List	
5/7	Podcast	6/?	Masterclass - Conflict, Part II	7/24	Roundtable - Estate & Legal Issues	8/6	Podcast
5/14	Practice Management Clinic - Sales/Marketing	6/5	Webinar - DEI Series Part IV				
5/22	Roundtable - Health Concerns in Client Families	6/11	Practice Management Clinic - Business				
		6/25	Emerging Leaders Mentorship				
		6/30 - Live Member Orientation 12pm ET				8/25 - Live Member Orientation 12pm ET	
<b>SEPTEMBER</b> Back To Work: Family Enterprise		<b>OCTOBER</b> Social Impact & Philanthropy		<b>NOVEMBER</b> UHNW Institute Symposium		<b>DECEMBER</b> That's a Wrap	
9/3	Podcast	10/1	Podcast: 50 Ways to Leave Your Legacy	11/5	Podcast	UHNW Holiday Gift Guide	
9/4	Roundtable: Family Enterprise	10/6 - 7	Collegium	11/6	Webinar	12/3	Podcast
9/10	Practice Management Clinic - Technology			11/?	UHNW Institute Training*	12/4	Signature Event / Roundtable
9/24	Emerging Leaders Mentorship			11/?	UHNW Symposium*		
		10/27 - Live Member Orientation 12pm ET				12/15 - Live Member Orientation 12pm ET	

## DOMAIN CONNECTION LEGEND



**FINANCIAL & INVESTMENT MANAGEMENT**



**ESTATE PLANNING & LEGAL ISSUES**



**SOCIAL IMPACT & PHILANTHROPY**



**RISK MANAGEMENT**



**GOVERNANCE & DECISION-MAKING**



**LEADERSHIP & TRANSITION PLANNING**



**LEARNING, DEVELOPMENT & THE RISING GENERATION**



**FAMILY DYNAMICS**



**HEALTH & WELL-BEING**



**FAMILY-ADVISORY RELATIONSHIPS**

# 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.



## 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.\*



## 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.\*



## 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.\*



## 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.\*



## 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 PODCAST

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



## 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.\*



## 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.



## 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.

*\*Event dates and times subject to change. Please refer to the **events page within the member portal** to confirm no changes have been made to event dates or times. Separate email communications and calendar invites will continue to be sent to members providing further event details closer to each event.*