



# 2025 PROGRAM CALENDAR

| JANUARY Strategic Planning for the New Year:         | FEBRUARY Integrated Wealth                        | MARCH Beneficiary Stories                                   | APRIL Financial & Investment Management        |
|--|---|---|--|
| Getting your House in Order                          | 2/13 🍨 Podcast                                    | 3/12 Practice Management Clinic - Service                   | 4/2 Podcast                                    |
| 1/8 Podcast: Risk Management                         | 2/12 A Practice Management Clinic - Human Capital | 3/22 Pre-Recorded Webinar: Successful Components for Hiring | 4/10 Pre-Recorded Webinar: Mentorship          |
|  |   | 3/25 Acoundtable - Beneficiary Trust Statute                | 4/23<br>4/24 Virtual Collegium: 2 Date Options |
|  | '   | 3/26 Emerging Leaders Mentorship                            | 4/23 FWR Investment & FinTech Forum            |
|  |   | '   | 4/30 Annual Women's Leadership Summit          |
|  | 2/24 - Live Member Orientation 12pm ET            |   | 4/28 - Live Member Orientation 12pm ET         |
| MAY Health & ② ⑥ ⑤ ⑤ Well Being                      | JUNE The Single Family Office                     | JULY Estate Planning & Legal Issues                         | AUGUST<br>Summer Break                         |
| 5/1 Annual Women's Leadership Summit                 | 6/16 • Podcast                                    | 7/2 🎐 Podcast   | UHNW Summer Reading List                       |
| 5/7 Podcast  | 6/11 FWR Cybersecurity Summit                     | 7/7 Roundtable - Business Sustainability                    | 8/6 🎐 Podcast                                  |
| 5/14 Practice Management Clinic - Sales/Marketing    | 6/17 C Masterclass - Conflict, Part II            | 7/15 Practice Management Clinic -<br>Business Management    | '  |
| 5/22 Roundtable - Health Concerns in Client Families | 6/25 🚰 Emerging Leaders Mentorship                | 7/24 Roundtable - Estate Planning & Legal Issues            |  |
|  |   |   |  |
|  | 6/23 - Live Member Orientation 12pm ET            |   | 8/25 - Live Member Orientation 12pm ET         |
| SEPTEMBER Back To Work: Family Enterprise            | OCTOBER Social Impact & Philanthropy              | NOVEMBER UHNW Institute Symposium                           | That's a Wrap                                  |
| 9/3 • Podcast  | 10/1 Podcast: 50 Ways to Leave Your Legacy        | 11/5 🎐 Podcast  | UHNW Holiday Gift Guide                        |
| 9/10 Practice Management Clinic - Technology         | 10/6 -7 Ocllegium                                 | 11/6 Webinar  | 12/3 Podcast                                   |
| 9/19 Family Business Legacies                        | 10/9 FWR Fintech Summit                           | 11/? 👚 UHNW Symposium*                                      | 12/4 Roundtable                                |
| 9/24 Emerging Leaders Mentorship                     |   |   |  |
| 9/? Webinar - DEI Initiative Series Part III         |   |   |  |
|  | 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



















# 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.\*



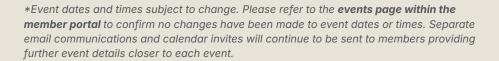
# UHNW INSTITUTE EMERGING LEADERS COHORT & MENTORSHIP PROGRAM

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.