



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 Practice Management Clinic - Human Capital	3/22 Pre-Recorded Webinar: Successful Components for Hiring	4/10 Pre-Recorded Webinar: Mentorship
		3/25 Roundtable - Beneficiary Trust Statute	4/23 4/24 Virtual Collegium: 2 Date Options
		3/26 🚰 Emerging Leaders Mentorship	4/23 SFWR 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 & Well Being	JUNE The Single Family Office	JULY Estate Planning & Legal Issues	AUGUST 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	6/12 Regional Event - Boston	7/15 A Practice Management Clinic - Business Management	
5/14 PYC In-Person Presentation and Networking	6/17 🎓 Masterclass - Conflict, Part II	7/24 Roundtable - Estate Planning & Legal Issues	
5/22 Roundtable - Health Concerns in Client Families	6/25 🚰 Emerging Leaders Mentorship	7/31 Regional Event - Denver	
	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	DECEMBER 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 🔯 Collegium	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.*



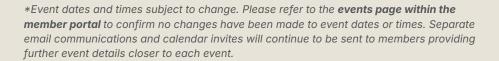
UHNW INSTITUTE EMERGING LEADERS COHORT & MENTORSHIP PROGRAM

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.