

# 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	2/13	Podcast	3/12	Practice Management Clinic - Service	4/2	Podcast
		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	Virtual Collegium: 2 Date Options
				3/26	Emerging Leaders Mentorship	4/23	FWR Investment & FinTech Forum
						4/24	
		2/24	Live Member Orientation 12pm ET			4/30	Annual Women's Leadership Summit
						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	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	Practice Management Clinic - Business Management		
5/14	NYC 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
<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
9/9	Roundtable: AIM Framework	10/6 -7	Collegium	11/6	Webinar	12/3	Podcast
9/10	Practice Management Clinic - Technology	10/9	FWR Fintech Summit	11/17	Symposium Training Session & Welcome Reception	12/4	Roundtable
9/19	Family Business Legacies			11/18	2025 Symposium		
9/24	Emerging Leaders Mentorship						
		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.*