SFO Circle

An Offering for Single Family Office Executives

The UHNW Institute was founded to support the wealth management industry, particularly the evolving needs of UHNW families and their family offices. As family structures grow more complex and multi-generational, single-family offices (SFOs) are being called upon to do more—with fewer resources and rising expectations. Many SFOs today wear multiple hats, navigating everything from investment oversight and governance to operations, legacy planning, and human capital management.

Simultaneously, family dynamics are shifting. Women, rising gen, and next-gen leaders are taking on greater influence and decision-making authority. Yet many SFOs struggle to find tailored resources, peer connection, and practical tools relevant to their unique operating model. The increasing complexity, longevity of families, and rapidly changing needs make it clear: the SFO space is undergoing a profound transformation, demanding new thinking and customized support.

To address these needs, the UHNW Institute brings together experts and practitioners from the family office world to foster meaningful dialogue, create actionable content, and elevate standards across the SFO community.

Our Mission

- To provide an intellectual framework and shared understanding of how SFOs operate and evolve
- Educate family office leaders on how to best support their families across generations and priorities
- Provide thought leadership, practical tools, and community access to SFO leaders seeking to professionalize, future-proof, and align their office operations
- Promote best practices, encourage innovation, and support sustainable growth across generations
- Foster an equitable, collaborative and trusted environment for family office professionals and families to exchange knowledge, benchmark approaches, and build community across diverse operating models

SFO Circle
The UHNW Institute

VISIT WWW.UHNWINSTITUTE.ORG TO VIEW THE MODEL AND DISCOVER MORE ABOUT THE UHNW INSTITUTE.

Why Join the Institute

Unbiased Thought Leadership

Members gain access to a curated library of original and third-party content developed by the Institute's expert Faculty. This online resource hub explores key topics across the Ten Domains of Family Wealth—offering practical tools, case studies, and insights specifically designed for Single-Family Offices. Members also benefit from a dynamic event calendar, including both Institute-wide programs and SFO-exclusive peer gatherings that foster meaningful learning and dialogue.

Peer-to-Peer Collaboration

The Institute offers a variety of opportunities for SFO leaders and professionals to connect, share ideas, and learn from one another. Whether through intimate clinics, regional meetups, or members-only discussion forums, we create trusted environments for open, solution-oriented conversations that are grounded in real-world challenges and experiences.

Original Content & Purpose-Built Programming

Our proprietary content, educational tools, and think-tank-quality programming are purpose-built for the SFO ecosystem. Members can engage with peers through interactive clinics, SFO working groups, and regional convenings. Additional offerings include our signature SFO podcast series, exclusive roundtables, and an annual symposium designed to surface best practices and elevate the SFO dialogue at large.

Membership Benefits

AT A GLANCE

Individual Membership – Leaders Council

Ideal for senior-level SFO executives and professionals with at least 5 years of experience across key functions such as investments, operations, philanthropy, and family governance.

Enterprise Membership

Designed for SFOs with a broader team, this membership includes access for two senior leaders, with the option to add additional individual memberships. It provides expanded access to resources and programs across the organization.

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WHAT'S INCLUDED:

Exclusive Content & Resource Library

- Access to the Ten Domains of Family Wealth framework, with SFO-specific applications
- Practice Management Pillars tailored to family office operations
- Custom-curated resources based on individual member needs

Programs & Events

- Select access to Institute-wide programming including:
  - Annual Symposium
  - Masterclasses and Roundtables
  - Webinars and Podcasts
  - Discounted admission to Family Wealth Report in-person events

SFO-Exclusive Experiences

- Quarterly Clinics focused on practice management challenges
- Study groups aligned with the Ten Domains and Family Capital Cluster
- Annual SFO Summit or Forum (half-day or full-day format)
- Regional SFO receptions and gatherings
- Dedicated SFO Podcast Series

Community Building

- Private access to the SFO member portal including:
  - Member directory
  - Peer forums and discussion boards
- SFO-only regional events and virtual convenings

Professional Development Opportunities (Additional Fee)

- Topic-specific programming for junior family office professionals, including:
  - Risk Management Bootcamp
  - Emerging Leader Half-Day Retreat
  - Topical intensives offered throughout the year

Advisory Services & Training (Fee-Based)

- Complimentary concierge advisory calls with Institute experts
- Half-day strategic consulting sessions
- Tailored training programs for:
  - SFO Executives
  - SFO Staff
  - Family Members

INSIGHTFUL EDUCATION. ACTIONABLE IDEAS. MEANINGFUL COLLABORATION.