

THE 5TH ANNUAL *UHNW Symposium Agenda*

November 17-18, 2025 | New York City

**FAMILY
WEALTHREPORT**

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MONDAY, NOVEMBER 17

10:15am – 11:00am

*NYC Public Library
476 5th Ave, New York, NY*

Optional Activity: NYC Public Library Tour

Private docent-led tour of the Stephen A. Schwarzman Building.

Please note that registration for this activity is full.

11:30am – 1:30pm

*Business Lounge, Paramount Club
1301 6th Ave, New York, NY*

Registration

12:00pm – 1:30pm

*Boardroom
Paramount Club*

Lunch Provided

Optional SFO Circle Clinic - Policies and Procedures (SFO Circle Members Exclusive)

Led By: Eugene Lipitz

Explore core policies and procedures every modern family office should adopt—and how technology, culture, and practical tools can help integrate them into daily operations to reduce risk.

12:00pm – 1:30pm

Auditorium
Paramount Club

Lunch Provided

Optional UHNW Institute Clinic – An AI Lab: Practical Innovation for Wealth Management

Led By: Tania Neild

This AI Clinic is designed to provide senior wealth management professionals with a practical understanding of how artificial intelligence can enhance both operational efficiency and client engagement. Through demonstrations, case studies, and a guided workshop, participants will examine various approaches to integrating AI—whether through general-purpose models, purpose-built tools, or platform extensions. The session will provide attendees with actionable insights to evaluate emerging technologies and make informed decisions about AI adoption within their organizations.

2:00pm – 3:15pm

Auditorium
Paramount Club

Optional Training: Bringing the Firm and the Family Together: Advanced Training on the Ten Domains and the New AIM Framework™

Led by: Jim Grubman and Tom McCullough

Building upon the fundamental 10 domains training delivered in 2024, attend this interactive training to expand your ten domains knowledge and discover the depth and functionality of the New AIM Framework™.

3:15pm – 3:30pm

Break

3:30pm – 4:30pm

Auditorium
Paramount Club

Training Continued

5:00pm – 6:30pm

Business Lounge + Game Room
Paramount Club

Welcome Reception

Networking, drinks and hors d'oeuvres

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HERCULES
THE STANDARD OF CARE IN SECURE VIDEO-CONFERENCING

TUESDAY, NOVEMBER 18

8:00am – 8:45am

Registration, Breakfast & Networking

*C1 Welcome Center, PwC
300 Madison Ave., New York, NY*

8:45am – 9:00am

Welcome & Introduction

*Auditorium
PwC*

9:00am – 9:40am

**Setting the Stage: Audience Expectations and
Emerging Leader Perspectives**

*Auditorium
PwC*

9:40am – 10:25am

**The Ten Domains Family Needs Assessment: Starting the
Conversation**

*Auditorium
PwC*

Kristin Keffeler, Angelique LeDoux, & Tom McCullough

In this interactive session, we will introduce the soon-to-be-launched Family Needs Assessment. This assessment is based on the UHNW Institute's Ten Domains of Family Wealth™ and is intended to be a conversation starter between a client and their advisor or a prospect and a potential advisory firm. We will share why the assessment was developed, what its intended goals are, and give participants a chance to experience how the use of this assessment can change and deepen the conversation between client and advisor.

10:25am–10:40am

Break

10:40am – 11:40am

Auditorium

PwC

The Institute's Toolkit in Action – Applications for Advisors and Families

Jim Grubman, Wally Head, & Kim Kamin

Presenters will touch on four of The Institute's best-practice tools – its Wealthsaurus™, Ten Domains of Family Wealth™, AIM Framework™, and Advisory Business Model Survey – and apply them to a typical UHNW family fact pattern. The most time will be spent on the AIM Framework and the update to the ABM Survey/Grid over the past year. The AIM Framework in particular will rely on a combination of the case scenario plus description of the Framework in general, engaging the audience in learning application of the new tool.

11:40am – 12:35pm

Auditorium

PwC

Real-world Service Delivery Models for Integrated Advice: Panel 1

Richard Joyner, Kathy Lintz, Tom McCullough, Thom Melcher, Michael Zeuner

This panel session will address the findings of a comprehensive research project examining how leading family offices and advisory firms deliver integrated advice and management to ultra-high-net-worth families. Drawing on in-depth interviews and case studies from a diverse set of firms, the panel will explore the commonalities and differences in service models, team structures, technology, governance, and client engagement. Attendees will gain insights into the drivers of success for integrated advisory models, the challenges of scaling and customization, and the evolving expectations of UHNW families. The session will feature real-world examples, and actionable recommendations, providing a rich foundation for dialogue.

12:35pm – 1:20pm

C1304 – C1306,

Additional Seating in C1301

PwC

Lunch & Networking

1:20pm – 2:30pm

Auditorium

PwC

Real-world Service Delivery Models for Integrated Advice: Panel 2

Richard Joyner, Kathy Lintz, Tom McCullough, Thom Melcher, Michael Zeuner

2:30pm – 2:45pm

Break

2:45pm – 3:45pm

Break-out Sessions

Auditorium (2), C1301, C1304,
C1305 & C1306
PwC

3:45pm – 4:15pm

Break-out Sessions Debrief

Auditorium
PwC

4:15pm – 5:15pm

The Integration Spectrum: Key Decisions & Value Drivers in Practice

Auditorium
PwC

Joe Calabrese, Kevin Casey, Bill Hedden, Kevin Moran, Charlie Willhoit

This panel brings together senior leaders from across the UHNW industry to share hands-on strategies and lessons learned in integrating wealth management platforms, services, and teams. The discussion will focus on tactical drivers of profitability, navigating trade-offs in operating models, structuring effective partnerships and outsourcing arrangements, and aligning pricing, capital, and investor expectations to support scalable growth and differentiated client experiences.

5:15pm – 5:30pm

Concluding Remarks & What to Expect from The Institute

Auditorium
PwC

6:00pm – 7:00pm

Cocktail Reception

*Rooftop, Bryant Park Grill
25 W 40th St, New York, NY*

All Symposium attendees are invited to a cocktail reception and dinner at Bryant Park Grill.

7:00pm – 9:00pm

Closing Dinner

South Garden, Bryant Park Grill