





2026 Program & Content Calendar*

JANUARY <i>Setting the Foundation</i> 		FEBRUARY <i>Passing the Baton</i>		MARCH <i>The Architects of Tomorrow</i>		APRIL <i>The Two-Way Path of Wisdom</i>	
1/29 	Webinar: Risk Management/Security	White Paper: Part 1 - A Blueprint for Multi-Generational Success		White Paper: Part 2 - A Blueprint for Multi-Generational Success		4/3 	UHNW Institute Podcast
		TBD 	UHNW Institute Podcast	3/3 	SFO Clinic (Dallas) **	4/8 	FWR FO FinTech Forum (NYC)
		2/12 	MFO Study Group	3/6 	UHNW Institute Podcast	4/9 	MFO Study Group
		2/19 	Webinar: Art & Collectibles	3/10 	Practice Management Clinic: Human Capital	4/23 	Virtual Collegium: Human Capital
		2/25 	Webinar: International	3/24 	Study Group - Book Club		
				3/26 	Roundtable: Mutli-gen Succession		
				TBD 	SFO Circle Podcast: Family at the Center: Redefining the Role of the SFO		
MAY <i>Firm-Family Fit</i>		JUNE <i>Leading with Intention</i>		JULY <i>In Their Own Words</i>		AUGUST <i>Hearing One Another</i>	
5/8 	UHNW Institute Podcast	UHNW Summer Reading List		5/3 	UHNW Institute Podcast	8/7 	UHNW Institute Podcast
5/12 	Practice Management Clinic: Service	6/5 	UHNW Institute Podcast	TBD 	Annual Planning for Large Estates (with Trust & Estates Magazine) - CLE Credits	8/20 	Webinar
5/14 	Roundtable	6/9 	Practice Management Clinic: Sales and Marketing				
TBD 	Regional Event: Dinner (D.C.)	6/10 	SFO Clinic: (Palm Beach) **				
TBD 	SFO Circle Podcast: Health & Wellness - Chief Wellness Officer	6/10 	Women's Summit (Palm Beach)				
		6/11 	MFO Study Group				
		TBD 	FWR Cybersecurity Summit				
SEPTEMBER <i>Inside the Family Office</i>		OCTOBER <i>Provocations for an Industry in Transition</i>		NOVEMBER <i>The Industry Evolves</i>		DECEMBER <i>The View Forward</i>	
9/4 	UHNW Institute Podcast	10/2 	UHNW Institute Podcast	UHNW Holiday Gift Guide		12/4 	UHNW Institute Podcast
9/8 	Practice Management Clinic: Business Management	10/5 	Collegium (Chicago)	11/6 	UHNW Institute Podcast	12/8 	Practice Management Clinic: Technology
9/18 	Roundtable			TBD 	Symposium (New York City)	12/10 	MFO Study Group
9/24 	Study Group - Book Club			TBD 	SFO Clinic (NYC) **	12/14 	Roundtable
TBD 	SFO Podcast: Next gen: Starting their own table					TBD 	SFO Podcast: Family Transitions

* 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.

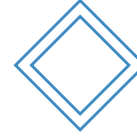
** Open to SFO Circle Members Only

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.

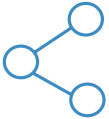
*Scheduled on a Wednesday every other month.**



Roundtable

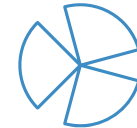
A panel discussion with in-house and outside experts offering real-life expertise and experience, providing attendees with best practices and a valuable learning experience. Discussion includes time for Q&A.

*Scheduled 5-6 times a year from 4-5:30 p.m.**



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. Lunchtime, live audience and pre-recorded speaker/panelist options.



Study Groups

Discussion groups centered on high-interest topics to promote learning and collaboration across domains.

*Schedules vary depending upon the Study Group.**



Podcast

The UHNW Institute produces two podcasts. The UHNW Institute Podcast, dedicated to UHNW firms, advisors and the families they serve, and The SFO Circle Podcast intended to provide practical and strategic content for Single-Family Offices.



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.

*Scheduled 3 times a year January (5:00 – 6:30p.m. ET), June & October (4 – 5:30p.m. ET)**



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.

Connection Legend

FIN

Financial & Investment
Management

LGL

Estate Planning
& Legal Issues

PHL

Social Impact
& Philanthropy

RSK

Risk
Management

GOV

Governance &
Decision-Making

LDR

Leadership & Transition
Planning

LRN

Learning, Development
& The Rising Generation

DYN

Family
Dynamics

HLT

Health &
Well-Being

FAR

Family-Advisory
Relationships