

Q1 | February 2026

Quarterly Newsletter

In this issue

1 **A Letter From the Chairman**

2 **New & Noteworthy**

2 **Resource Library Updates**

3 **Q1 Themes & Events**

4 **Featured Member**



A Letter from the Chairman

As we begin 2026, I'd like to take a moment to reflect on the strong foundation we have built at the UHNW Institute in 2025 and share a clear view of where the Institute is headed next. Thanks to the dedication of our Board of Directors, Faculty, Advisory Board members, and our thought leadership and marketing teams, the past year was one of meaningful progress, operational strengthening, and growing visibility across the UHNW landscape.

In 2025, much of our focus was deliberately internal: strengthening governance, advancing succession planning, expanding infrastructure, and delivering our signature programming while also launching major initiatives such as the Single Family Office Circle. At the same time, our thought leadership initiatives continued to gain momentum, with the introduction of the AIM Framework, the Wealthesaurus, and a growing body of practical, industry-shaping content. Together, these efforts helped position the Institute for long-term sustainability and greater impact.

Looking ahead, 2026 will be a year of **expansion, refinement, and deeper engagement**. Building on last year's progress, we will broaden our reach internationally and introduce new programming that reflects cross-cultural perspectives and the evolving needs of UHNW families and family offices around the world. We will continue to advance Integrated Family Wealth Management through new tools and resources, expand practice management programming, and further develop offerings for the SFO Circle.

New content focused on women and wealth, expanded regional in-person gatherings, and new programming addressing lifestyle-related topics will also be central to our work in the year ahead. Insights from our 2025 DEI initiative will be fully embedded across our frameworks, education, and programming as we address the realities of the modern family.

Another key area of focus in 2026 will be the continued development of programming to support **emerging leaders and the rising generation**, as the role of next-generation family members and future

firm leaders becomes increasingly important to long-term success.

2026 also marks an important leadership transition that reflects the Institute's commitment to continuity and stewardship. As Jim Grubman retires from his formal role as Content and Curriculum Chair and transitions to the Emeritus Board, we are grateful for his enduring impact on the Institute and the field. With Tom McCullough assuming the role of Managing Director of Thought Leadership and Strategy, we are well-positioned to carry our agenda forward with focus, rigor, and innovation.

As 2026 unfolds, our priorities remain clear: to strengthen our community, deliver the most relevant and objective content in the UHNW space, and translate thought leadership into real-world practice. With key initiatives underway, the launch of a new Institute website in Q1 designed to enhance the member experience and a strong calendar of events and flagship gatherings ahead, 2026 promises to be a year defined not only by growth but by **depth, quality, and lasting impact**.

Together, we are continuing to shape the future of the family wealth industry and set the standard for how UHNW families are served worldwide.



Steve Prozano

Chairman and CEO
The UHNW Institute

New & Noteworthy



Tom McCullough Appointed Managing Director of Thought Leadership and Strategy

Tom McCullough's appointment positions the Institute to carry its agenda forward with clarity, rigor, and continued innovation.



New Institute Website Will Be Launching in Q1

A streamlined, content-forward experience for easier access to the Institute's thought leadership, programs, and resources.



2025 Symposium Report Now Available

The full 2025 Symposium Report captures key insights and real-world lessons from our flagship event, highlighting how firms are building integrated models today.



Beneficiary Stories

We invite member firms and the families you serve to join us in our objective to capture the beneficiary experience and share the lessons learned with our membership and the industry at large.

Explore beneficiary-related resources currently available to members.

- The Voice of the Rising Generation: Family Wealth and Wisdom

Book by James E Hughes, Keith Whitaker, Susan E. Massenzio

- Born Rich Movie

Video by Jamie Johnson / Wise and Good Film LLC

- The Experience of Inherited Wealth: A Social-Psychological Perspective

Whitepaper by Joanie Bronfman / University Microfilms International

- The Quest for Legitimacy

Book by Jamie Weiner / Wiley

Resource Library Update

Institute members have exclusive access to a growing collection of tools and educational resources built to support your work with complex families within The UHNW Institute's **Resource Library**.

An updated **Resource Library Guide** has been created on how to navigate the Library efficiently and apply the materials available. The Guide directs you to the frameworks, research, and thought leadership most

relevant to your work, with clear ways to use them in practice.

If you are not a member and are interested in getting access to the Resource Library and other Institute resources, **click here to inquire about membership today.**

January Theme

Strategic Planning

This month explores the essential practices and perspectives—organizational, relational, and operational—that help advisors, families, and leaders start strong, clarify priorities, and build intentional plans for the year ahead.

January 29, 2026 – Past Event

The Obsolete Armor: Integrated Risk Management for the AI Era

Presented by Edward Marshall, CEO of [Presage Global](#).

Time: 3:30-4:30PM ET

A replay will be available to members later this month in the Resource Library

February Theme

Next Gen Leadership

This month examines the changing needs of families and firms in the midst of generational handoffs—illuminating real stories of evolving roles, rising expectations, and what both generations are asking of the other.

February 19, 2026

The Evolving Art & Collectibles Landscape: Market Trends and NextGen Implications

Presented by Ron Varney, Principal, Ronald Varney Fine Art Advisors.

Time: 3:30-4:30PM ET

[Register Now](#)

February 25, 2026

Pre-Recorded Webinar – Global Perspectives, Shared Challenges

Laurent Roux and our International Advisory Board highlight what advisors are seeing firsthand in their work with families and advisors in their regions around the world.

Webinar will be made available on 2.25.26

Q1 Themes and Events

[Download the 2026 Calendar](#)

March Theme

Succession for Firms and Families

Inside the minds of those architecting the advisory firms of the future. Hear how they're redesigning culture, teams, and client experience for a new era.

March 10, 2026

Practice Management Clinic – Human Capital: Skills Development

Kristen Keffeler, co-author of *Wealth 3.0*, will facilitate the first PMC of 2026 as we delve into education and training, with specific emphasis on skills development for rising leadership.

Time: 3:30PM ET

[Register Now](#)

March 24, 2026

NEW: The UHNW Institute Book Club – *The Art of Gathering: How We Meet and Why It Matters*

Explore timely ideas with a network of fellow professionals. Designed for those who value thoughtful dialogue, reflection, discussion, and cross-domain learning.

Two Available Times: 12PM ET or 4PM ET

[Register Now](#)

March 26, 2026

Whitepaper Deep-Dive – A Blueprint for Multi-Generational Success: Building a Coalition of the Willing

Featuring authors: Amelia Renkert-Thomas, Russ Haworth, Daniel Trimarchi, Paul Edeleman, Bryn Monhahan, and Meredith Straight.

Time: 3:30-5PM ET

[Registration Opening Soon](#)

Featured Member

Meredith Straight



Meredith Straight

Member, Consultant | Renkert Thomas Consulting

[Connect on LinkedIn](#) | [Read Bio](#)

Why did you join the Institute?

I have the great privilege of working with families with my family everyday- I co-own and operate Renkert Thomas Consulting with my mom, Amelia Renkert-Thomas. We are a small team and like it that way—it provides us a great deal of flexibility in taking clients where we think we can make an impact, balancing client work and thought leadership, and prioritizing other important components of our lives. I do think, though, that this work cannot be done well in solitude. Whether that is pushing on our thinking in various areas or finding better fits when we are not the right team to serve a client's needs, being part of a community with aligned values that is constantly working to push the industry to grow in the right direction is invaluable. I greatly enjoy that I am both able to contribute and learn here, surrounded by a group of such talent and thoughtfulness eager to do the same.

What's your best advice to an emerging professional entering the field now?

I have found it to be a fundamental truth of being a younger professional in this space that I am far less lonely than I once may have thought, and yet the industry continues to need younger voices to both further the work of our more seasoned colleagues and to ensure that we as an industry are meeting the needs of this generation of rising generation clients. There are elements of that experience that are relatively stable through time, but today's unique mix of economic

and cultural forces must be accounted for as well. So much expertise is built over the course of a career, but there is specific knowledge that emerging professionals can bring today. Joining a variety of conversations and entering spaces that you find engaging can provide a real impact—seek out those opportunities early and often.

You have an upcoming paper, co-authored with fellow Institute faculty, *A Blueprint for Multi-Generational Success: Building a Coalition of the Willing*. What are 1-3 core takeaways you believe are most important for readers to understand or apply?

There is a societal script about the denominator effect—"a new generation means more mouths to feed." The economic realities of a broadening ownership base certainly need to be considered, but one of the topics I loved discussing most with my co-authors was the optionality that this growing human capital base provides. So often, among our clients, the reaction to succession is, "How do I replace this key person?" But as families grow, one-to-one substitution becomes less critical. Yes, shoring up critical talent and skills is important, but the conversation can become, "How do we elevate a group of individuals who together bring the talent and skills we need to make this system thrive?" Additionally, as multiple spheres, domains, or rooms of governance are built out, tapping new kinds of talent and skills can be extremely valuable—a family council chair needs a different skillset than a board member—but both are critical to the family's success. An MBA isn't the only path to making a difference.

We discuss an alternative to the baton pass- adding new governance seats without requiring the current

[Read the full interview](#)