



Enterprise Membership

Firm/Business Unit

Less than 100 members
\$8,000 Annually

100 or more staff members
\$14,000 Annually

For firms or business units within larger companies providing services to UHNW families. Smaller enterprise membership includes two Individual Leaders Council Members and larger enterprise membership includes four Individual Leaders Council Members, with the ability to add unlimited additional Leaders Council Members and/or unlimited Associate Enterprise Memberships for a fee.

<h3>Enterprise Benefits</h3> <p>Permission for the firm/business unit to use its Institute membership as a credential</p> <p>Two or four Leaders Council Memberships (details on the right) with the ability to add unlimited additional Leaders Council Members for \$3,000 each</p> <p>Ability to add unlimited Associate Enterprise Memberships (details below) for \$1,000 each</p> <h3>Associate Enterprise Benefits</h3> <p>Associate Enterprise Members are rising leaders who are professional advisors to UHNW families and have at least 10 years of experience in the wealth management industry, with most of those years in the UHNW segment.</p> <ul style="list-style-type: none"> Virtual participation in the annual Symposium* Participation in the Institute's Emerging Leaders Cohort and Mentorship Program, associate events and trainings Access to the Institute's Member Portal, including the Community Forum Access to the Resource Library Access to recordings of Institute events Permission to use the Membership as a credential 	<h3>Leaders Council Benefits</h3> <p>Leaders Council Members are C-suite executives or hold an equivalent professional role, have at least 15 years of approved experience, and endorse the Institute's Mission.</p>
	<p>Participation in Institute events* (Invitation-only events may require additional fee)</p>
	<p>Unrestricted access to the Institute's Member Portal, including the Community Forum and Resource Library</p>
	<p>Permission to use the Leaders Council Membership as a credential</p>
	<p>Opportunities to present at Institute events</p>
	<p>Access to recordings of select Institute events</p>
	<p>Opportunities to collaborate and/or contribute original content</p>
	<p>Participation opportunities on committees or task forces for Institute Initiatives</p>
	<p>Custom briefings by UHNW Institute thought leaders provided on request**</p>
	<p>Rapid response conference calls on select issues available on request**</p>

* Breakout groups may be separated by membership type

** Depending upon the scope of the request an additional charge may apply

