



SFO Circle Membership

For Individuals and Enterprises

Individuals (1 Executive)
\$4,000 Annually

Enterprises (2 Executives)
\$9,000 Annually

For single-family office (SFO) leaders devoted to guiding ultra-high-net-worth families through the complexities of substantial wealth. The family may or may not operate an active business alongside the family office. Individual membership includes **one** Individual Leaders Council Member and Enterprise membership includes **two** Individual Leaders Council Members, with the ability to add unlimited additional Leaders Council Members for a fee.

<h2 style="color: #800080;">Leaders Council Benefits</h2> <p>SFO Circle Leaders Council Members are senior-level executives (C-suite) or experienced professionals with at least 5 years of relevant family office experience. Roles may include professionals in investments, operations, philanthropy, family dynamics, or other key functional areas.</p> <h3 style="color: #800080;">Additional Benefits for Enterprises</h3> <p>Two licenses for unrestricted access to The Institute’s Resource Library for family office staff</p> <p>Permission for the family office to use its Institute membership as a credential</p> <p>Two Leaders Council Memberships (details above) with the ability to add unlimited additional Leaders Council Members for \$1,500 each</p>	Participation in Institute events* (<i>Invitation-only events may require additional fee</i>)
	SFO only event access
	Permission to use the Leaders Council Membership as a credential
	Unrestricted access to the Institute’s Member Portal, including the Community Forum and Resource Library and SFO specific collections
	Opportunities to present at Institute events
	Access to recordings of select Institute events and SFO Inner Circle conversations
	Opportunities to collaborate and/or contribute original content
	Participation opportunities on committees or task forces for Institute Initiatives
	Custom briefings by UHNW Institute thought leaders provided on request**
	Rapid response conference calls on select issues available on request**

* Breakout groups may be separated by membership type

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

