UHNW Institute Training

Bespoke Interdisciplinary Training Programs for Firms and Advisors Serving UHNW Clients

The UHNW Institute's Vision, an Evolving Landscape

The world of wealth advising is changing. It demands that the industry evolve to meet the increasingly complex needs of UHNW family systems. The UHNW Institute recognizes that the issues and experiences of families of wealth are broadly based and do not fit into the siloed landscape of advisory services. Both advisors and families benefit when advisors have the understanding and skills to integrate the many cross-domain issues that UHNW families face. To foster these skills and understanding, the Institute offers learning and training resources to advisors of all levels.

Training with Expertise from The UHNW Institute

As a nonprofit tax-exempt organization, The Institute operates as a think tank and learning exchange, empowering UHNW families and family offices to make the best possible choices for family needs across generations. To further its charitable mission, The Institute offers educational training, proprietary tools, and useful resources to advisors, wealth management firms, and family offices, grounded in the Institute's comprehensive understanding of the wealth management. These tools and resources help advance how advisors serve UHNW clients, foster best practices, and encourage sustainable positive change within the industry. ***Come to us with your training and development goals.***

We offer customized learning experiences for advisors and firms serving UHNW families.

"The resources and tools provided, along with a new approach to serving clients, really prepared me to handle the expanding needs of my clients"

THE TEN DOMAINS OF FAMILY WEALTH™ TRAINING PARTICIPANT

The UHNW Institute

VISIT WWW.UHNWINSTITUTE.ORG TO VIEW THE MODEL AND DISCOVER MORE ABOUT THE UHNW INSTITUTE.

What We Offer

Led by industry-leading faculty, the Institute offers professional development programs across the full range of topics relevant to families of wealth and their advisors. Topics range from Governance to Estate Planning, Philanthropy, Family Dynamics, and more. Diverse program formats meet learners where they are, with synchronous and asynchronous learning capabilities to support your firm's needs, budget, and preferences.
A Certificate of Completion is available for participants who complete all course requirements.

PROGRAM OPTION 1: OPEN ENROLLMENT PROGRAMS FOR MEMBERS

Individuals and firms may attend periodically scheduled member training sessions targeting key segments of The Ten Domains of Family Wealth™ and associated advisor skills.

Core features: synchronous online and in-person sessions; workshops; skills acquisition; collaborative, peer-learning environment; case studies and common applications in advising.

PROGRAM OPTION 2: THE TEN DOMAINS OF FAMILY WEALTH™ ELEARNING PLATFORM

Self-study modules exploring the Ten Domains of Family Wealth™ integrated with the new Assessment-Implementation-Monitoring Framework (AIM Framework), offering advisors an opportunity to enhance their skills tailored to their needs.

Core features: asynchronous independent study; expansion of core knowledge; case studies and applications in advising

PROGRAM OPTION 3: CUSTOMIZED ADVISOR TRAINING FOR FIRMS

Tailored training programs grounded in the Institute's proprietary Ten Domains of Family Wealth™ and the delivery of Integrated Wealth Management (IWM) solutions

Member Firm wanted to grow its human capital in order to move upstream and improve the firm's ability to serve UHNW clients. They requested an orientation to the Ten Domains of Family Wealth™ ("Ten Domains") plus in-depth training for three domains that extended beyond their core financial expertise.

The program we created: A fully remote, synchronous three-level program culminating in a skills development workshop for their advisors to hone their client relationship expertise:

Level 1 – Orientation and overview of the Ten Domains model including its implications and utility for UHNW advising

- Synchronous; remote; experiential activities and breakout groups to connect concepts to professional practice

Level 2 – A deeper look at three (out of nine) content areas of the Ten Domains that were of specific strategic interest to the firm:

- Risk Management
- Learning, Development & the Rising Generation
- Health & Well-being

Each session consisted of a domain overview plus application of concepts in synchronous, remote learning sessions. Sessions included preparatory activities, case studies, and breakout sessions to provide opportunities to hone knowledge and build practical skills to reinforce the learning experience.

Level 3 – A predominantly skills-oriented workshop to better understand and integrate cross-domain topic areas for advisors. The extended session incorporated techniques to expand advisors' conversations with clients, improve discovery techniques, and deepen trust.

- Synchronous; remote; active participant engagement in typical client scenarios and case activities, actively demonstrating and then discussing new tools for improved client outcomes.

> "I now see how the 10 Domains of Family Wealth are interconnected and the importance of integrating solutions for my clients."
>
> THE TEN DOMAINS OF FAMILY WEALTH™ TRAINING PARTICIPANT

Available Formats for Custom Training

We offer a range of modalities to be selected and customized in conjunction with your firm's leadership:

Synchronous sessions – Minimal lecture, high engagement, peer discussion, and experiential learning

- Virtual or in-person
- Firm-specific workshop activities, case walkthroughs, breakout activities, targeted knowledge enhancement
- Preparatory activities and follow-up tools and exercises available

Asynchronous capabilities – Efficient and flexible since advisors learn on their own schedule

- Instructional videos
- Supplemental resources – independent learning activities, articles, interviews, white papers, media, diverse industry content

Available Methods

- **Interactive Experiences:** Expert-led discussions with real-world case studies
- **Workshops & Breakout Sessions:** Hands-on activities and client scenario practices
- **Panel Discussions:** Insights from industry leaders and experienced professionals
- **Q&A and Reflection Sessions:** Personalized guidance and open discussions
- **Materials & Resources:** via our ever-growing UHNW Institute Resource Library
- **Assessment and Measurement:** customized, preparatory and/or follow-up assessments available

NEXT STEPS

To discuss an UHNW Institute training option for your firm, please contact: training@uhnwinstitute.org

The UHNW Institute

"The skills-focused workshops helped me to better understand the cross-domain issues families face and to deliver integrated solutions to my clients. The program was outstanding!"

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