

# 2026 Program & Content Calendar\*

	<b>RSK</b>		<b>LGL LDR GOV</b>		<b>LDR LRN GOV LGL</b>		<b>LRN FAR LDR FIN</b>
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)
		2/19	Webinar: Art & Collectibles	3/10	Practice Management Clinic: Human Capital	4/9	MFO Study Group
		2/27	MFO Study Group	3/19	Webinar: International	4/9	FWR FO Investment Forum
				3/23	UHNW Institute Podcast	4/23	Virtual Collegium: Human Capital
				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		
	<b>FAR HLT</b>		<b>LRN RSK LDR</b>		<b>LGL LDR DYN</b>		<b>HLT FAR LRN</b>
5/8	UHNW Institute Podcast		UHNW Summer Reading List	7/3	UHNW Institute Podcast	8/7	UHNW Institute Podcast
5/12	Practice Management Clinic: Service	6/2	Regional Event (Charlotte)	TBD	Annual Planning for Large Estates (with Trust & Estates Magazine) - CLE Credits	8/20	Webinar: UHNW Virtual Wellness Retreat
5/14	Roundtable	6/5	UHNW Institute Podcast				
5/19	SFO Regional Event (D.C.)**	6/9	Practice Management Clinic: Sales and Marketing				
5/20	Regional Event (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				
		6/11	FWR Cybersecurity Summit				
	<b>FIN LRN</b>		<b>PHL GOV</b>		<b>FIN LGL PHL RSK GOV LDR LRN DYN HLT FAR</b>		<b>LDR DYN</b>
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	10/6		11/16	Symposium (New York City)	12/10	MFO Study Group
9/24	Study Group - Book Club			11/16	SFO Clinic (NYC)**	12/14	Roundtable
9/24	SFO Clinic (Chicago)**					TBD	SFO Podcast: Family Transitions
TBD	SFO Podcast: Next Gen: Starting their Own Table						

\* 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



### UHNW Masterclass

A skills-based, quarterly, 90-minute virtual course on topics requested by membership, with engaging breakout sessions for hands-on learning.



### UHNW Institute Collegium, A SIGNATURE EVENT

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.



### UHNW Institute Podcast

The UHNW Institute produces three podcast shows: *The UHNW Institute Podcast*—dedicated to UHNW firms, advisors and the families they serve—has two categories: *Family Enterprise with Russ Haworth* and *Private Wealth with Joe Reilly*. *The SFO Circle Podcast*, with host Kristen Oliveri, provides practical and strategic content for Single-Family Offices once a quarter.



### UHNW Institute Symposium, A SIGNATURE EVENT

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.



### UHNW Practice Management Clinic

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.



### UHNW Institute Women's Summit, A SIGNATURE EVENT

An annual event that explores the evolving role of women as primary wealth decision-makers. Data-driven and research-based, this intimate gathering provides expert insight, peer exchange and practical frameworks that have highlighted topics including: the Great Wealth Transfer, leadership across generations and the expanding influence of women in shaping investment, legacy and societal impact.



### UHNW Institute 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.



### UHNW Institute Emerging Leaders Program

Virtual and in-person educational, career-enhancing and networking sessions throughout the year, dedicated to firm Emerging Leaders, including our annual *Emerging Leaders Cohort & Mentorship Program*, an intimate group of firm-appointed candidates that form a learning cohort to support the rising stars of the industry.



### UHNW Institute Study Groups

Discussion groups focused on high-interest topics to promote learning and collaboration across domains and Initiatives, including the *MFO Study Group* and *The UHNW Institute Book Club*.



### Extended Programming

Additional programs presented throughout the year in response to member interests and emerging themes. Offerings include regional networking events, co-hosted collaborations, and partner-led programs.



### UHNW Institute Webinar

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



### UHNW Institute Exclusive Content

Enjoy our signature content from faculty, staff and member-contributed white papers, articles and toolkits, as well as our *UHNW Institute Summer Booklist*, *UHNW Institute Holiday Gift Guide* and more.

## 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