



Leadership Council Membership

For Individuals

\$4,000 Annually

<p>Leaders Council Membership</p> <p>For senior professionals who meet the below required criteria:</p> <ul style="list-style-type: none"> • C-Suite executive or the equivalent professional role in a firm or practice providing services to UHNW families • At least 15 years of approved experience • Endorses the Institute’s Mission <p>Memberships at this level are approved by the Membership Committee, which may require references.</p>	Participation in Institute events* (Invitation-only events may require additional fee)
	Unrestricted access to the Institute’s Member Portal, Community Forum and Resource Library
	Permission to use the Leaders Council Membership as a credential
	Opportunities to present at Institute events
	Opportunities to collaborate or contribute original content
	Access to recordings of select Institute events
	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*

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





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

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Enterprise Membership

Associations + Nonprofits

Less than 100 members

\$6,000 Annually

100 or more staff members

\$10,500 Annually

Enterprise Benefits

Ten or twenty licenses for unrestricted access to The Institute's Resource Library for firm staff

Permission for the association/nonprofit to use its Institute membership as a credential

Two or four Leaders Council Memberships (details on the right) with the ability to add unlimited additional Leaders Council Members for \$3,000 each

Leaders Council Benefits

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.

Participation in Institute events* (Invitation-only events may require additional fee)

Unrestricted access to the Institute's Member Portal, including the Community Forum and Resource Library

Permission to use the Leaders Council Membership as a credential

Opportunities to present at Institute events

Access to recordings of select Institute events

Opportunities to collaborate and/or contribute original content

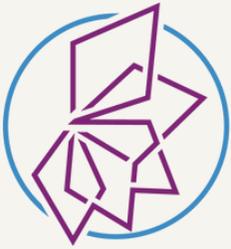
Participation opportunities on committees or task forces for Institute Initiatives

Custom briefings by UHNW Institute thought leaders provided on request**

Rapid response conference calls on select issues available on request**

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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>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>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

