

2026 Program & Content Calendar

JANUARY <i>Setting the Foundation / Strategic Planning through the Lens of the Ten Domains and AIM Framework</i> RSK		FEBRUARY <i>Passing the Baton / Next Gen Leadership</i> LGL LDR GOV		MARCH <i>The Architects of Tomorrow: Succession and the Coalition Mindset</i> LDR LRN GOV LGL		APRIL <i>The Two-Way Path of Wisdom/ Emerging Leaders & Mentorship/Talent Development</i> LRN FAR LDR FIN	
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	3/13	SFO Circle Podcast: Family at the Center: Redefining the Role of the SFO	4/9	MFO Study Group
		2/27	MFO Study Group	3/18	Practice Management Clinic: Human Capital	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		
				3/30	Webinar: International		
MAY <i>Firm-Family Fit: Bridging Institutional Vision and Human Need"/ The Family Needs Assessment Domains</i> FAR HLT		JUNE <i>Leading with Intention / Women's Summit</i> LRN RSK LDR		JULY <i>In Their Own Words / Beneficiary Stories</i> LGL LDR DYN		AUGUST <i>Hearing One Another: The Voice of the Trustee & The Family Voice</i> HLT FAR LRN	
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)	7/16	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	7/23	Annual Planning for Large Estates (with Trust & Estates Magazine) - CLE Credits		
5/19	SFO: Regional Event (D.C.)*	6/9	Practice Management Clinic: Sales and Marketing	7/30	Annual Planning for Large Estates (with Trust & Estates Magazine) - CLE Credits		
5/20	Regional Event (D.C.)	6/10	SFO Clinic: (Palm Beach)*				
TBD	SFO Circle Podcast: Health & Wellness - Chief Wellness Officer	6/10 6/11	Women's Summit (Palm Beach)				
		6/11	MFO Study Group				
		6/11	FWR Cybersecurity Summit				
SEPTEMBER <i>Inside the Family Office / SFO Circle</i> FIN LRN		OCTOBER <i>Provocations for an Industry in Transition / Collegium</i> PHL GOV		NOVEMBER <i>The Industry Evolves / The Symposium</i> ALL		DECEMBER <i>The View Forward: Integrating the Voices, Charting the Future</i> LDR DYN	
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 10/6	Collegium (Chicago)	11/6	UHNW Institute Podcast	12/8	Practice Management Clinic: Technology
9/18	Roundtable			11/16 11/17	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						

Connection Legend

ALL All Domains

FIN Financial & Investment Management

LDR Leadership & Transition Planning

LGL Estate Planning & Legal Issues

LRN Learning, Development & The Rising Generation

PHL Social Impact & Philanthropy

DYN Family Dynamics

RSK Risk Management

HLT Health & Well-Being

GOV Governance & Decision-Making

FAR Family-Advisory Relationships

Calendar Key

**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**

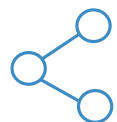
Virtual and in-person educational, career-enhancing and networking sessions throughout the year, dedicated to firm Emerging Leaders, including our annual *Emerging Leaders Cohort & Mentorship Program*, an intimate group of firm-appointed candidates that form a learning cohort to support the rising stars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