

2026 Program & Content Calendar

| JANUARY RSK Setting the Foundation / Strategic Planning through the Lens of the Ten Domains and AIM Framework | | FEBRUARY LGL LDR GOV Passing the Baton / Next Gen Leadership | | MARCH LDR LRN GOV LGL The Architects of Tomorrow: Succession and the Coalition Mindset | | APRIL LRN FAR LDR FIN The Two-Way Path of Wisdom/ Emerging Leaders & Mentorship/Talent Development | |
|--|--|---|--|---|---|---|--|
| 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 | 4/9 | Webinar: International |
| | | | | 3/24 | Study Group - Book Club | 4/23 | Virtual Collegium: Human Capital |
| | | | | 3/26 | Roundtable: Multi-gen Succession | 4/29 | Trove FOW Industry Summit |
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| MAY FAR HLT Firm-Family Fit: Bridging Institutional Vision and Human Need / The Family Needs Assessment Domains | | JUNE LRN RSK LDR Leading with Intention / Women's Summit | | JULY LGL LDR DYN In Their Own Words / Beneficiary Stories | | AUGUST HLT FAR LRN Hearing One Another: The Voice of the Trustee & The Family Voice | |
| 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) | 7/9 | Roundtable | 8/20 | Webinar: UHNW Virtual Wellness Retreat |
| 5/19 | SFO: Regional Event (D.C.)* | 6/5 | UHNW Institute Podcast | 7/16 | Annual Planning for Large Estates (with Trust & Estates Magazine) - CLE Credits | | |
| 5/20 | Regional Event (D.C.) | 6/9 | Practice Management Clinic: Sales and Marketing | 7/23 | Annual Planning for Large Estates (with Trust & Estates Magazine) - CLE Credits | | |
| 5/28 | Roundtable | 6/10 | SFO Clinic: (Palm Beach)* | 7/30 | Annual Planning for Large Estates (with Trust & Estates Magazine) - CLE Credits | | |
| 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 | | | | |
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| SEPTEMBER FIN LRN Inside the Family Office / SFO Circle | | OCTOBER PHL GOV Provocations for an Industry in Transition / Collegium | | NOVEMBER ALL The Industry Evolves / The Symposium | | DECEMBER LDR DYN The View Forward: Integrating the Voices, Charting the Future | |
| 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 | 10/8 | Roundtable | 11/17 | | 12/14 | Roundtable |
| 9/24 | SFO Clinic (Chicago)* | | | 11/16 | SFO Clinic (NYC)* | TBD | SFO Podcast: Family Transitions |
| TBD | SFO Podcast: Next Gen: Starting their Own Table | | | | | | |
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Connection Legend

ALL All Domains

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

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.



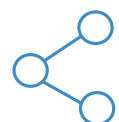
UHNW Institute Study Groups

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.