



# 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.



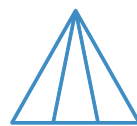
## Extended Programming

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.



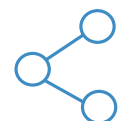
## UHNW Institute Study Groups

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*.



## 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.



## 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.

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.