



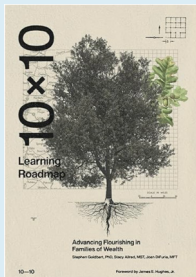
The
UHNW
Institute

Summer Reading List 2024



Book List

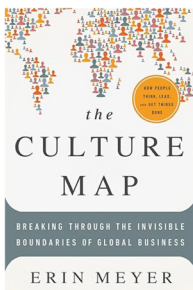
Business Related Books



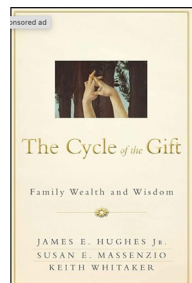
The 10×10 Learning Roadmap: Advancing Flourishing in Families of Wealth

By Stephen Goldbart, Stacy Allred and Joan DiFuria

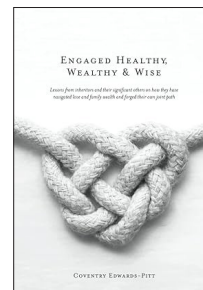
Ten core learning competencies at ten vital life stages provide multigenerational UHNW families with the skills they need to feel empowered throughout life.



An international business expert shares ways to navigate cultural differences.



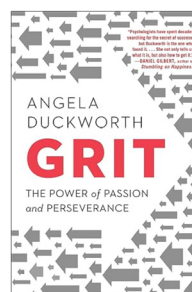
A classic in the family wealth industry that addresses not just giving—but giving well. The goal is for the gift to have a positive influence on its recipient's life.



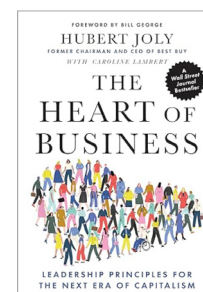
Shares stories, anecdotes and advice from couples who successfully navigated the complexity of planning a future together with a large wealth inheritance.



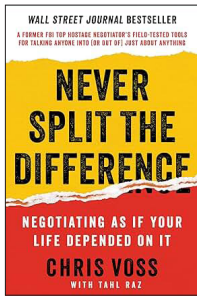
A how-to guide to help families build and maintain an enduring family enterprise.



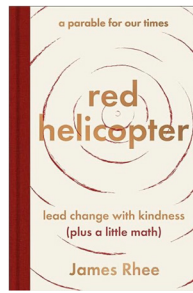
A psychologist explores what it takes to be a high-achiever. Rather than talent, a blend of passion and persistence.



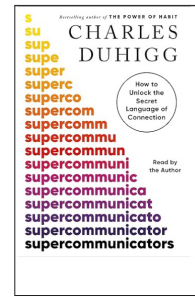
Joly shares the philosophy behind his success. Pursue a noble purpose, put people at the heart of business, create an environment where every employee can thrive and treat profit as an outcome, not the goal.



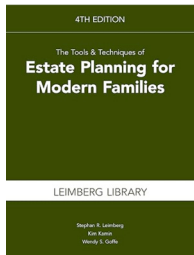
A former FBI hostage negotiator offers a remarkable approach to high-stakes negotiations.



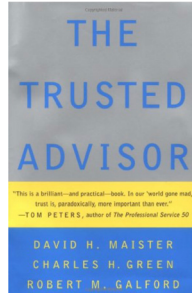
A high school teacher turned private equity investor shares lessons to help find balance between personal and professional; compassion and business; and life and money.



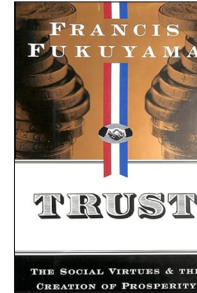
Learn how to enhance the superpower of communication by learning how to recognize and match the kind of conversation you are engaging in.



This updated edition of a widely used resource discusses estate planning issues with a particular focus on how they apply to modern families.

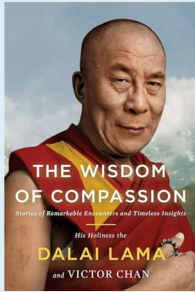


A seminal work unpacking the rational and emotional components of trustworthiness.



An exploration of many cultures helps clarify the interconnectedness of economic and social prosperity.

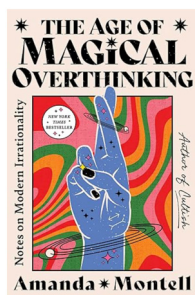
Leisure Pursuits



The Wisdom of Compassion: Stories of Remarkable Encounters and Timeless Insights

By His Holiness the Dalai Lama and Victor Chan

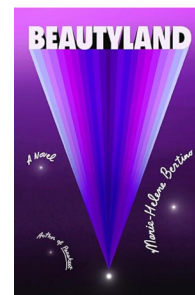
A personal portrait of the Dalai Lama that details his many friendships and encounters through the framework of achieving happiness through compassion.



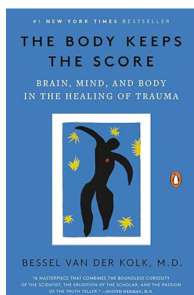
The belief that one's internal thoughts can affect unrelated events in the external world is considered magical thinking. The author of this bestseller asserts that this thought-trap is the result of informational overload.



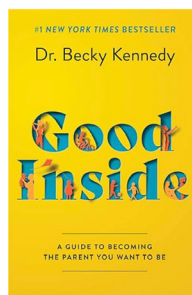
Described by many as the best novel ever written, this work explores society and humanity through the lens of nineteenth-century Russia.



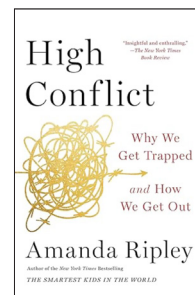
A moving and unique literary fiction title disguised as science fiction. Adina has been sent to chronicle the experience of life as a human and report findings back to her home planet.



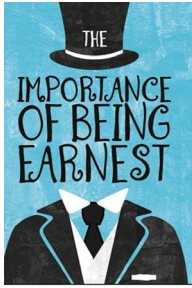
An expert in trauma shares its devastating impact on the body and the mind; and how treatments such as neurofeedback, meditation and sports can promote healing.



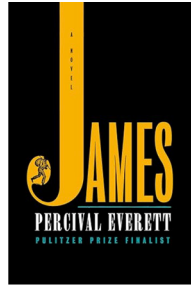
A practical guide to raising resilient, emotionally healthy kids, and a supportive resource for overwhelmed parents who need more compassion and less stress.



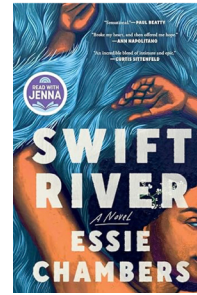
Break out of the trap of high conflict. Learn what happens to our brains when conflict itself takes over and how to overcome this dangerous phenomenon.



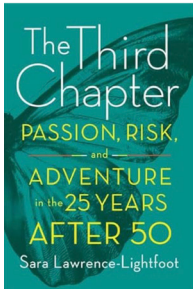
This satire of Victorian society is considered Wilde's greatest work. Conveys serious issues in a light-hearted manner.



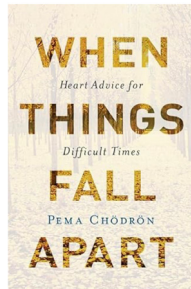
Retells the *Adventures of Huckleberry Finn* from the perspective of Jim.



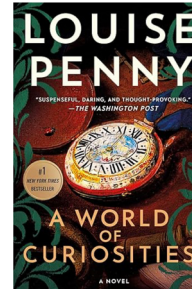
After her Father disappeared, Diamond was the only Black person in all of Swift River. When she receives a letter from family, she discovers a shared history she never knew.



A renowned sociologist reveals ways that the "neither young nor old" chapter of life can inspire individual growth and cultural transformations.



In difficult times, embrace grief and painful situations rather than attempt to overcome them.



In the latest book in this wildly popular literary mystery series, Chief Inspector Gamache finds himself heading up a homicide investigation after the discovery of a 160-year-old letter.



Podcasts



The UHNW Institute Podcast

Hosted by Russ Haworth

Learn from Institute member expertise and thought leaders.



HBR Women at Work

Conversations about where we're at and how we move forward.



The Inheritance Podcast with Joe Reilly

Conversations with thought leaders on the non-financial side of family office work.



The Psychology of Your 20s with Jemma Sbeg

The podcast that explains the psychology behind the weird, transitional and wonderful experiences of our 20s.



The Rainbow Bull with Tim Volk

A proud member of the LGBTQ community discusses a range of topics around the five capitals of a flourishing family: human, intellectual, social, spiritual and financial capital.

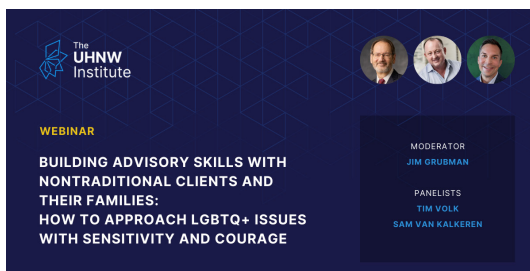


TED Talks Daily

Thought-provoking ideas on every subject imaginable—from Artificial Intelligence to Zoology, and everything in between—from the world's leading thinkers and creators.



Videos



UHNW Institute Pride Webinar – Building Advisory Skills with Nontraditional Clients and Their Families

In a facilitated discussion with two experienced gay wealth advisors, attendees learned practical tips for fostering and navigating LGBTQ+ client relationships.



UHNW Institute Webinar – The Corporate Transparency Act: Managing Significant Challenges Faced by Families, Family Offices and Advisors

A panel of experts details the complex reporting requirements of the CTA and discusses ways it may impact UHNW clients and families.



Articles and Other Reads



The
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The UHNW Institute | Practice Management Clinic Articles:

Thought leadership and lessons learned from Institute Practice Management Clinics

- [Human Capital - The Way Forward and the Talent Challenge](#)
- [Service - Customization, Scalability and Growth in a complex world!](#)
- [Sales and Marketing - Finding New Clients, Pipelines & Pipeline Management and Prospect Conversion](#)

CRAIN CURRENCY
WHERE FAMILY WEALTH MEETS WISDOM

Crain Currency | Dynamic Agendas: What world-leading family offices are discussing now:

Managing trillions of dollars of assets on behalf of prominent families, family offices need constant insights into key issues impacting wealth. Here are some of the cutting-edge takeaways from a flagship family office gathering.

CRAIN'S
NEW YORK BUSINESS

Crain's New York Business | Companies are ditching golf for pickleball to get deals done:

While golf courses have long been hailed as the premier venue for closing deals and wooing clients, a growing number are finding that pickleball saves them time and money while being more inclusive and easier for newcomers to play.

FAMILY WEALTHREPORT

Family Wealth Report | Protecting Clients, Firms In the Age Of AI And Proliferating Tech:

Cybersecurity continues to be a challenge for advisors working with HNW clients, knowing that criminals target this population group. With AI and other technologies on the rise, threats proliferate—but hopefully, so do means of defense.

Family Wealth Report | UHNW Institute Unveils Ambitious Initiative to Set Industry Standards by Charles Paikert:

The Institute's new initiative to create a clearer, and more measurable, picture of the services that wealth managers and family offices provide.



**Harvard
Business
Review**

Harvard Business Review | Overcoming Your Fear of Giving Feedback by Deborah Grayson Riegel:

Managers often have preconceived notions that can act as a barrier to giving timely, helpful and honest performance feedback.