



# 2025 PROGRAM CALENDAR

JANUARY Strategic Planning for the New Year:	FEBRUARY Integrated Wealth	MARCH Beneficiary Stories	APRIL Financial & Investment Management
Getting your House in Order	2/13 🌓 Podcast	3/5 Podcast	4/2 Podcast
1/8 • Podcast: Risk Management	2/12 Practice Management Clinic - Human Capital	3/12 🗼 Practice Management Clinic - Service	4/23 Ø Collegium
	2/27 Webinar: Successful Components for Hiring	3/19 🚵 Emerging Leaders Mentorship	4/24 FWR FinTech Forum
		3/25 Roundtable - Beneficiary Trust Statute	4/30 Annual Women's Leadership Summit
	2/24 - Live Member Orientation 12pm ET		4/28 - Live Member Orientation 12pm ET
MAY Health & Well Being	JUNE The Single Family Office	JULY Estate Planning & Legal Issues	AUGUST Summer Break
5/1 Annual Women's Leadership Summit	6/4 Podcast	7/2 Podcast	UHNW Summer Reading List
5/7 🎐 Podcast	6/5 Webinar - DEI Initiative Series Part III	7/24 Roundtable - Estate & Legal Issues	8/6 🎐 Podcast
5/14 Represent Clinic - Sales/Marketing	6/11 🚴 🕮 PMC - Business Management FWR Cybersecurity Summit		
5/22 Roundtable - Health Concerns in Client Families	6/17 🎓 Masterclass - Conflict, Part II		
	6/25 🕍 Emerging Leaders Mentorship		
	6/30 - Live Member Orientation 12pm ET		8/25 - Live Member Orientation 12pm ET
SEPTEMBER Back To Work: Family Enterprise	OCTOBER Social Impact & Philanthropy	NOVEMBER UHNW Institute Symposium	That's a Wrap
9/3 Podcast	10/1 Podcast: 50 Ways to Leave Your Legacy	11/5 Podcast	UHNW Holiday Gift Guide
9/4 Roundtable: Family Enterprise	10/6 -7 🔯 Collegium	11/6 Webinar	12/3 🌓 Podcast
9/10 Practice Management Clinic - Technology		11/? 🛨 UHNW Symposium*	12/4 Signature Event / Roundtable
9/24 🚰 Emerging Leaders Mentorship			
9/? Webinar - DEI Initiative Series Part IV			
	10/27 - Live Member Orientation 12pm ET		12/15 - Live Member Orientation 12pm ET

DOMAIN CONNECTION LEGEND

























# CALENDAR KEY



# **COLLEGIUM**

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.



# SYMPOSIUM

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.\*



# PRACTICE MANAGEMENT CLINIC

Monthly 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.\*



# **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.\*



#### WEBINARS

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.\*



#### STUDY GROUPS

Discussion groups centered on high-interest topics to promote learning and collaboration across domains.

Schedules vary depending upon the Study Group.\*



#### THE UHNW INSTITUTE PODCAST

The UHNW Institute Podcast, a monthly podcast dedicated to UHNW firms, advisors and the families they serve. Recording schedule is TBD.



#### THE UHNW INSTITUTE MASTERCLASS

A skills-based, quarterly, 90-minute virtual course on topics requested by membership, with engaging breakout sessions for hands-on learning.\*



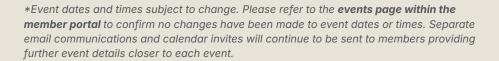
# UHNW INSTITUTE EMERGING LEADERS COHORT & MENTORSHIP PROGRAM

A 4-part learning cohort with training program for the emerging leaders within Institute member firms. This intimate group of firm -appointed candidates meets quarterly for a year and includes at least one in-person optional meet-up event to network and support connection.



#### **UHNW INSTITUTE SIGNATURE EVENT**

UHNW Institute special events hosted throughout the year range from membership networking events to exclusive partnered get-togethers to support our growing community.





# **UHNW COMMUNITY FORUM**

An exclusive 24/7 member discussion platform for peer exchange, sharing insight and thought leadership, posing pertinent questions to our trusted colleagues and opportunities to extend the dialogue from previous events and shared content.