

2025 Event Calendar

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
JUL 14-16 Chicago, IL Family Office and Wealth Advisor Forum	AUG 14 Virtual Technology Resource Partner Focus Group: Asset Vantage	SEP 2 Nashville, TN Tech Selection Workshop	OCT 2 Virtual Technology Resource Partner Focus Group: WealthHub Solutions	NOV 4-6 Marco Island, FL Senior Management Council	DEC 1 Virtual Established Enterprise Families Cohort
JUL 31 Virtual Technology Resource Partner Focus Group: BILL		SEP 3-5 Nashville, TN Technology and Risk Management Showcase	OCT 7-8 Sausalito, CA Executive Council '14	NOV 5 Virtual Member Webcast: Year-End Tax Strategies for Family Offices: OBBBA and Beyond	DEC 2 Virtual Early-Stage Business Families Cohort
		SEP 9 Virtual Emerging Enterprise Families Cohort	OCT 10 Dallas, TX Regional Meeting	NOV 10-12 New York, NY Family Advisor Training Program (Virtual Modules: Oct. 23, Dec. 10, Jan. 14)	DEC 2 Virtual Multi-Gen Business Families Cohort
		SEP 9 Virtual Multi-Gen Business Families Cohort	OCT 19 Atlanta, GA Direct Investing Dinner	NOV 13 Virtual Technology Resource Partner Focus Group: Nines	DEC 3 Virtual Financial Families Cohort
		SEP 10 Virtual Public Webcast: State of the Ultra-Wealth Business: Confidence and Opportunities Abound	OCT 19-20 Atlanta, GA Rising Gen Forum	NOV 18-21 Virtual Family Office Design Workshop	DEC 4 Miami Beach, FL Art Basel: Brunch at the Club
		SEP 10 New York, NY Regional Meeting	OCT 20-22 Atlanta, GA Family Forum	NOV 19 Virtual Member Webcast: Designing Effective Learning Programs	DEC 9 Virtual Emerging Enterprise Families Cohort
		SEP 10 Virtual Established Enterprise Families Cohort	OCT 22-23 Atlanta, GA Owners Council		
		SEP 11 Virtual Early-Stage Business Families Cohort	OCT 28 Virtual Public Webcast: Connecting Capital and Opportunity: Dubai's Role in the Future of Global Family Enterprise		
		SEP 16 Virtual Financial Families Cohort			
		SEP 16-17 Paris, France Global Family Enterprise Council			
		SEP 22-26 Amsterdam ROEF Academy: Module 1			
		SEP 23 Virtual Technology Resource Partner Focus Group - KnowLedger			
		SEP 23-25 Banff, AB (CA) Executive Council '04			
		SEP 30-OCT 1 Virtual Trustees and Beneficiaries Workshop			



Family
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Listing as of November 4, 2025 - Dates and locations are subject to change.
 For individual event details and to register, please visit familyoffice.com/learning-programs.

In-person event Virtual event

2026 Event Calendar

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
JAN 21 Virtual Public Webcast	FEB 3 Virtual Emerging Enterprise Families Cohort	MAR 4 Virtual Member Webcast	APR 1 Virtual Member Webcast	MAY 6 Virtual Member Webcast	JUN 2 New York, NY Regional Member Meeting
JAN 22 Virtual Technology Resource Partner Focus Group: FundCount	FEB 3 Virtual Multi-Gen Business Families Cohort	MAR 11-13 Location TBD Executive Council '14	APR 7-8 Location TBD Global Enterprise Family Council	MAY 5-6 Location TBD Emerging Enterprise Family Summit	JUN 9 Virtual Spring Family Advisor Training Program (VIRTUAL SESSION 2)
JAN 27-29 Virtual Private Trust Company Workshop	FEB 4 Virtual Member Webcast	MAR 13-14 Location TBD Rising Gen Leadership Program (Sapphire Edition)	APR 21-23 Location TBD Owners Council	MAY 11-13 Chicago, IL Spring Family Advisor Training Program (IN-PERSON SESSION)	JUN 10 Virtual Member Webcast
JAN 26-30 Miami, FL ROEF Academy: Module 4 Enterprise Strategies, Shared Ownership, and Family Governance	FEB 5 Virtual Early-Stage Business Families Cohort	MAR 16 Palm Beach, FL Private Family Capital Investment Dinner With the Direct Investing Network	APR 23 Virtual ROEF Academy: Module 6 Wealth Management and Investment Principles	MAY 12-14 Location TBD Senior Management Council	
	FEB 10 Virtual Established Enterprise Families Cohort	MAR 16-17 Palm Beach, FL Private Family Capital Summit	APR 28 Chicago, IL Regional Member Meeting	MAY 18-22 Amsterdam, NL ROEF Academy: Module 7 Wealth and Impact, Enterprise Sustainability, and Your Future Roles	
	FEB 11 San Antonio, TX Regional Member Meeting	MAR 17-18 Palm Beach, FL Strategic CIO Council	APR 28 Virtual Spring Family Advisor Training Program (VIRTUAL SESSION 1)	MAY 19 Virtual Emerging Enterprise Families Cohort	
	FEB 12 Virtual Financial Families Cohort	MAR 19 Virtual ROEF Academy: Module 5 Collaboration and Decision-making	APR 29-30 Location TBD Multi-Family Office Council	MAY 19 Virtual Multi-Gen Business Families Cohort	
	FEB 12 Virtual Technology Resource Partner Focus Group: Auria	MAR 25-26 Location TBD Integrated Wealth Advisor Council		MAY 21 Virtual Financial Families Cohort	
	FEB 23-24 Florida, TBD Build an Enterprise Family Workshop	MAR TBD Toronto, ON Regional Member Meeting		MAY 28 Virtual Early-Stage Business Families Cohort	
	FEB 25-27 Location TBD Executive Council '04			May 28 Virtual Established Enterprise Families Cohort	



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JUL 1 Virtual Member Webcast	AUG 4 Virtual Emerging Enterprise Families Cohort	SEP 2 Virtual Member Webcast	OCT 7 Virtual Member Webcast	NOV 3-4 Location TBD Fall Family Advisor Training Program (IN-PERSON SESSION)	DEC 1 Virtual Emerging Enterprise Families Cohort
JUL 12-13 Denver, CO Emerging Leaders Program	AUG 4 Virtual Multi-Gen Business Families Cohort	SEP 3 Dallas, TX Regional Member Meeting	OCT 7-9 Location TBD Executive Council '14	NOV 3-5 Location TBD Senior Management Council	DEC 1 Virtual Multi-Gen Business Families Cohort
JUL 13-15 Denver, CO Family Office and Wealth Advisor Forum	AUG 4 Virtual Spring Family Advisor Training Program (Alumni Session)	SEP 9-10 Virtual Trustees and Beneficiaries Workshop	OCT 18 Chicago, IL Private Family Capital Investment Dinner With the Direct Investing Network	NOV 4 Virtual Member Webcast	DEC 2 Virtual Member Webcast
JUL 22 Virtual Public Webcast	AUG 5 Virtual Member Webcast	SEP 15 Austin, TX Technology Selection Workshop	OCT 18-19 Chicago, IL Rising Gen at the Family Forum	NOV 17-20 Virtual Family Office Design Workshop	DEC 8 Virtual Early-Stage Business Families Cohort
JUL 30 Virtual Financial Families Cohort	AUG 6 Virtual Early-Stage Business Families Cohort	SEP 16-17 Austin, TX Technology and Risk Management Showcase	OCT 19-21 Chicago, IL Family Forum		DEC 8 Virtual Established Enterprise Families Cohort
	AUG 6 Virtual Established Enterprise Families Cohort	SEP 23-25 Location TBD Executive Council '04	OCT 21-22 Chicago, IL Owners Council		DEC 9 Virtual Fall Family Advisor Training Program (VIRTUAL SESSION 2) (Fall Alumni Session will be held on Feb. 10, 2027)
		SEP 29 Chicago, IL Regional Member Meeting	OCT 28 Virtual Fall Family Advisor Training Program (VIRTUAL SESSION 1)		DEC 10 Virtual Financial Families Cohort