

# 2025 Learning Programs

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
<b>JAN 9   Virtual</b> Technology Resource Partner Focus Group - Pinnacle Fund Services	<b>FEB 5   Virtual</b> Member Webcast	<b>MAR 3-4   Location TBA</b> Chief Learning Officers Meeting	<b>APR 1   Virtual</b> Technology Resource Partner Focus Group	<b>APR 30-MAY 1   Miami, FL</b> Private Family Capital Summit	<b>JUN 4-5   Virtual</b> Trustees and Beneficiaries Workshop
<b>JAN 22   Virtual</b> Public Webcast: Managing Complexity: Helping Families Succeed Along Their Evolutionary Journey	<b>FEB 5-6   Coral Gables, FL</b> Building an Enterprise Family Workshop	<b>MAR   Date/Location TBA</b> Executive Council '14	<b>APR 8-9   Location TBA</b> Global Family Enterprise Council	<b>MAY 2   Miami, FL</b> Private Family Capital Summit Additional Meeting	<b>JUN 11   Virtual</b> Member Webcast
<b>JAN 27-31   Miami, FL</b> ROEF Academy – Module 1	<b>FEB 7   Virtual</b> Member Town Hall	<b>MAR 6   Virtual</b> Technology Resource Partner Focus Group	<b>APR 9-10   Virtual</b> Premier Technology and Risk Management Days	<b>MAY 6   Virtual</b> Risk Management Member Meeting	<b>JUN 12   Virtual</b> Marketing Partner Webcast
<b>JAN 28-30   Virtual</b> Private Trust Company Workshop	<b>FEB 11   Virtual</b> Marketing Partner Webcast	<b>MAR 11   Virtual</b> Marketing Partner Webcast	<b>APR 15   Virtual</b> Marketing Partner Webcast	<b>MAY 7   Virtual</b> ROEF Academy – Module 6	<b>JUN 17   Virtual</b> Technology Resource Partner Focus Group
	<b>FEB 12   Virtual</b> Member Webcast	<b>MAR 12   Virtual</b> Member Webcast	<b>APR 16   Virtual</b> Member Webcast	<b>MAY 7-8   New York, NY</b> Multi-Family Office Council	<b>JUN 18   Virtual</b> Member Webcast
	<b>FEB 13   Virtual</b> Technology Resource Partner Focus Group	<b>MAR 12   Virtual</b> ROEF Academy – Module 3	<b>APR 22-24   Location TBA</b> Owners Council	<b>MAY TBA   New York, NY</b> Senior Management Council	<b>JUN 24-27   Virtual</b> Family Office Design Workshop
	<b>FEB   Date/Location TBA</b> Industry Leaders Summit	<b>MAR 13   Virtual</b> Risk Management Member Meeting	<b>APR 23   Virtual</b> ROEF Academy – Module 5	<b>MAY 13-14   Chicago, IL</b> Family Advisor Training Program (Virtual Modules: April 29, June 10, and August 5)	
	<b>FEB 19   Virtual</b> ROEF Academy – Module 2	<b>MAR 19   Virtual</b> Member Webcast	<b>APR 23   Virtual</b> Member Webcast	<b>MAY 14   Virtual</b> Member Webcast	
	<b>FEB 18-21   Virtual</b> Winter Technology and Risk Management Days	<b>MAR 19-20   Nashville, TN</b> Integrated Wealth Advisors Council	<b>APR 29-30   Miami, FL</b> Strategic CIO Council	<b>MAY 19-23   Amsterdam</b> ROEF Academy – Module 7	
	<b>FEB 25-27   Palm Coast, FL</b> Executive Council '04	<b>MAR 21-22   Nashville, TN</b> Rising Gen Leadership Program - Topaz Edition	<b>APR 30   Miami, FL</b> Direct Investing Dinner	<b>MAY 22   Virtual</b> Marketing Partner Webcast	
	<b>FEB 26   Virtual</b> Member Webcast	<b>MAR 24-28   Amsterdam</b> ROEF Academy – Module 4	<b>APR 30-MAY 1   Miami, FL</b> Private Family Capital Summit	<b>MAY 29   Virtual</b> Technology Resource Partner Focus Group	
		<b>MAR 26   Virtual</b> Member Webcast			

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JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
<b>JUL 14-16   Chicago, IL</b>	<b>AUG 14   Virtual</b>	<b>SEP 8   Nashville, TN</b>	<b>OCT   Date/Location TBA</b>	<b>NOV 4-6   Location TBA</b>	<b>DEC 3   Virtual</b>
Family Office and Wealth Advisor Forum	Technology Resource Partner Focus Group	Technology Selection Workshop	Executive Council '14	Senior Management Council	Member Webcast
<b>JUL 24   Virtual</b>	<b>AUG 19   Virtual</b>	<b>SEP 9-11   Nashville, TN</b>	<b>OCT 2   Virtual</b>	<b>NOV 5   Virtual</b>	<b>DEC 10   Virtual</b>
Marketing Partner Webcast	Marketing Partner Webcast	Technology and Risk Management Showcase	Technology Resource Partner Focus Group	Member Webcast	Member Webcast
<b>JUL 29   Virtual</b>		<b>SEP 17   Virtual</b>	<b>OCT 19   New York, NY</b>	<b>NOV 6   Virtual</b>	<b>DEC 10-11   New York, NY</b>
Risk Management Member Meeting		UHNW Webcast (Open to Public)	Direct Investing Dinner	Marketing Partner Webcast	Rising Gen: G4 Event
<b>JUL 31   Virtual</b>		<b>SEP 18   Virtual</b>	<b>OCT 19-20   Atlanta, GA</b>	<b>NOV 25   Virtual</b>	<b>DEC 11   Virtual</b>
Technology Resource Partner Focus Group		Marketing Partner Webcast	Rising Gen Forum	Risk Management Member Meeting	Technology Resource Partner Focus Group
		<b>SEP   Date/Location TBA</b>	<b>OCT 20-22   Atlanta, GA</b>		<b>DEC 16   Virtual</b>
		Global Family Enterprise Council	Family Forum		Marketing Partner Webcast
		<b>SEP 23-25   Banff, AB (CA)</b>	<b>OCT 22-23   Atlanta, GA</b>		
		Executive Council '04	Owners Council		
		<b>SEP 29-30   New York, NY</b>	<b>OCT 29   Virtual</b>		
		Family Advisor Training Program (Virtual Modules: September 16, November 4, December 2)	Member Webcast		
			<b>OCT 30   Virtual</b>		
			Marketing Partner Webcast		