

2026 Event Calendar

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
JAN 14 Virtual Member Webinar	FEB 3 Virtual Emerging Enterprise Families Cohort	MAR 4 Virtual Member Webinar Outsourcing Series: Part 2	APR 1 Virtual Member Webinar	MAY 4-6 Savannah, GA Senior Management Council	JUN 2 Virtual Newly Liquid Families Cohort
JAN 20 Virtual Public Webinar	FEB 3 Virtual Multi-Gen Business Families Cohort	MAR 11 Virtual Member Webinar	APR 7-8 New York, NY Integrated Wealth Advisor Council	MAY 5, 7, 12, 14, 19, 21, 26, 28 AI in Action! Workshop	JUN 3 Virtual Member Webinar
JAN 22 Virtual Technology Resource Partner Focus Group: FundCount	FEB 4 Virtual Member Webinar Outsourcing Series: Part 1	MAR 11-13 Nassau, Bahamas Executive Council '04	APR 8 Virtual Member Webinar Outsourcing Series: Part 3	MAY 6 Virtual Member Webinar Outsourcing Series: Part 4	JUN 4 Virtual Early-Stage Business Families Cohort
JAN 27-29 Virtual Private Trust Company Workshop	FEB 5 Virtual Early-Stage Business Families Cohort	MAR 13-14 Denver, CO Rising Gen Leadership Program (Sapphire Edition)	APR 15 Virtual Technology Resource Partner Focus Group: Mastro	MAY 11-13 Chicago, IL Spring Family Advisor Training Program (IN-PERSON SESSION)	JUN 9 New York, NY Regional Member Meeting
JAN 26-30 Miami, FL ROEF Academy: Module 4 Enterprise Strategies, Shared Ownership, and Family Governance	FEB 10 Virtual Established Enterprise Families Cohort	MAR 16-17 Palm Beach, FL Private Family Capital Summit	APR 21-23 La Jolla, CA Owners Council	MAY 18-22 Amsterdam, NL ROEF Academy: Module 7 Wealth and Impact, Enterprise Sustainability, and Your Future Roles	JUN 9 Virtual Spring Family Advisor Training Program (VIRTUAL SESSION 2)
	FEB 10 Virtual Newly Liquid Families Cohort	MAR 17-18 West Palm Beach, FL Strategic CIO Council	APR 22 Virtual Member Webinar	MAY 19 Virtual Emerging Enterprise Families Cohort	JUN 17 Virtual Partner Webinar: Nines
	FEB 12 Virtual Financial Families Cohort	MAR 19 Virtual Technology Resource Partner Focus Group: Entitykeeper	APR 23 Virtual ROEF Academy: Module 6 Wealth Management and Investment Principles	MAY 19 Virtual Multi-Gen Business Families Cohort	JUN 23 Virtual Established Enterprise Families Cohort
	FEB 12 Virtual Technology Resource Partner Focus Group: Auria	MAR 19 Virtual ROEF Academy: Module 5 Collaboration and Decision-making	APR 28 Chicago, IL Regional Member Meeting	MAY 19 Location TBD Global Enterprise Family Council	JUN 24 Virtual Member Webinar Outsourcing Series: Part 5
	FEB 18 Virtual Member Webinar	MAR 25-27 San José del Cabo Executive Council '14	APR 28 Virtual Spring Family Advisor Training Program (VIRTUAL SESSION 1)	MAY 21 Virtual Financial Families Cohort	
	FEB 25 Virtual Member Webinar		APR 28 Virtual Advisors Cohort	MAY 27 Virtual Member Webinar	
			APR 29-30 New York, NY Industry Leaders Meeting		
			APR 30 San Antonio, TX Regional Member Meeting		

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JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
JUL 1 Virtual Member Webinar	AUG 4 Virtual Spring Family Advisor Training Program (Alumni Session)	SEP 2 Virtual Member Webinar	OCT 7 Virtual Member Webinar	NOV 2-4 Dallas, TX Fall Family Advisor Training Program (IN-PERSON SESSION)	DEC 1 Virtual Emerging Enterprise Families Cohort
JUL 8 Virtual Partner Webinar: ORCA	AUG 5 Virtual Member Webinar	SEP 3 Dallas, TX Regional Member Meeting	OCT 7-9 Santa Barbara, CA Executive Council '14	NOV 10-12 Nashville, TN Senior Management Council	DEC 1 Virtual Multi-Gen Business Families Cohort
JUL 12-13 Denver, CO Emerging Leaders Program	AUG 12 Virtual Partner Webinar: ORCA	SEP 9-10 Austin, TX Technology and Risk Management Showcase	OCT 20 Chicago, IL Private Family Capital Investment Dinner With the Direct Investing Network	NOV 10-13 Virtual Family Office Design Workshop	DEC 2 Virtual Member Webinar
JUL 13-15 Denver, CO Family Office and Wealth Advisor Forum	AUG 19 Virtual Member Webinar	SEP 11 Austin, TX Technology Selection Workshop	OCT 20-21 Chicago, IL Rising Gen at the Family Forum	NOV TBD Location TBD Latam Family Enterprise Summit	DEC 3 Virtual Newly Liquid Families Cohort
JUL 22 Virtual Public Webinar	AUG 26 Virtual Member Webinar	SEP 22-23 Chicago, IL Build an Enterprise Family Workshop	OCT 21-23 Chicago, IL Family Forum	NOV 17 Toronto, CA Regional Member Meeting	DEC 8 Virtual Early-Stage Business Families Cohort
		SEP 22-23 Kansas City, MO Global Enterprise Family Council	OCT 21-22 Chicago, IL Owners Council	NOV 18 Virtual Member Webinar	DEC 8 Virtual Established Enterprise Families Cohort
		SEP 23 Virtual Partner Webinar: BILL & SumIt	OCT 28 Virtual Partner Webinar: Asset Vantage		DEC 9 Virtual Fall Family Advisor Training Program (VIRTUAL SESSION 2)
		SEP 23-25 Location TBD Executive Council '04	OCT 28 Virtual Fall Family Advisor Training Program (VIRTUAL SESSION 1)		(Fall Alumni Session will be held on Feb. 10, 2027)
		SEP 29 Chicago, IL Regional Member Meeting			DEC 10 Virtual Financial Families Cohort
		Sep 30-Oct 1 Virtual Trustees and Beneficiaries Workshop			