2026 Event Calendar

JANUARY

JAN 14 | Virtual

Member Webinar

JAN 20 | Virtual

Public Webinar

JAN 22 | Virtual

Technology Resource Partner Focus Group: FundCount

JAN 27-29 | Virtual

Private Trust Company Workshop

JAN 26-30 | Miami, FL

ROEF Academy: Module 4

Enterprise Strategies, Shared Ownership, and Family Governance **FEBRUARY**

FEB 3 | Virtual

Emerging Enterprise Families Cohort

FEB 3 | Virtual

Multi-Gen Business Families Cohort

FEB 4 | Virtual

Member Webinar

FEB 5 | Virtual

Early-Stage Business Families Cohort

FEB 10 | Virtual

Established Enterprise Families Cohort

FEB 11 | San Antonio, TX

Regional Member Meeting

FEB 12 | Virtual

Financial Families Cohort

FEB 12 | Virtual

Technology Resource Partner Focus Group: Auria

FEB 18 | Virtual

Member Webinar

MARCH

MAR 4 | Virtual

Member Webinar

MAR 11-13 | Location TBD

Executive Council '04

MAR 13-14 | Denver, CO

Rising Gen Leadership Program (Sapphire Edition)

MAR 16-17 | Palm Beach, FL

Private Family Capital Summit

MAR 17-18 | West Palm Beach, FL

Strategic CIO Council

MAR 19 | Virtual

Technology Resource Partner Focus Group: Entitykeeper

MAR 19 | Virtual

ROEF Academy: Module 5

Collaboration and Decision-making

MAR 25-27 | Location TBD

Executive Council '14

MAR TBD | Toronto, ON

Regional Member Meeting

APRIL

APR 1 | Virtual

Member Webinar

APR 7-8 | Location TBD

Integrated Wealth Advisor Council

APR 7-8 | Location TBD

Global Enterprise Family Council

APR 21-23 | La Jolla, CA

Owners Council

APR 23 | Virtual

ROEF Academy: Module 6 Wealth Management and

Investment Principles

APR 28 | Chicago, IL

Regional Member Meeting

APR 28 | Virtual

Spring Family Advisor Training Program (VIRTUAL SESSION 1)

APR 29-30 | New York, NY

Industry Leaders Meeting

MAY

MAY 4-6 | Location TBD

Senior Management Council

MAY 6 | Virtual

Member Webinar

MAY 11-13 | Chicago, IL

Spring Family Advisor Training Program (IN-PERSON SESSION)

MAY 18-22 | Amsterdam, NL

ROEF Academy: Module 7

Wealth and Impact, Enterprise Sustainability, and Your Future Roles

MAY 19 | Virtual

Emerging Enterprise Families Cohort

MAY 19 | Virtual

Multi-Gen Business Families Cohort

MAY 21 | Virtual

Financial Families Cohort

MAY 28 | Virtual

Early-Stage Business Families Cohort

May 28 | Virtual

Established Enterprise Families Cohort

JUNE

JUN 2 | New York, NY

Regional Member Meeting

JUN 9 | Virtual

Spring Family Advisor Training Program (VIRTUAL SESSION 2)

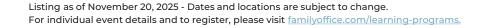
JUN 10 | Virtual

Member Webinar

JUN 16-18 | Chicago, IL

Build an Enterprise Family Workshop





2026 Event Calendar

JULY

JUL1 | Virtual

Member Webinar

JUL 12-13 | Denver, CO

Emerging Leaders Program

JUL 13-15 | Denver, CO

Family Office and Wealth Advisor Forum

JUL 22 | Virtual

Public Webinar

JUL 30 | Virtual

Financial Families Cohort

AUGUST

AUG 4 | Virtual

Emerging Enterprise Families Cohort

AUG 4 | Virtual

Multi-Gen Business Families Cohort

AUG 4 | Virtual

Spring Family Advisor Training Program (Alumni Session)

AUG 5 | Virtual

Member Webinar

AUG 6 | Virtual

Early-Stage Business Families Cohort

AUG 6 | Virtual

Established Enterprise Families Cohort

Aug 19-20 | Virtual

Trustees and Beneficiaries Workshop **SEPTEMBER**

SEP 2 | Virtual

Member Webinar

SEP 3 | Dallas, TX

Regional Member Meeting

SEP 15 | Austin, TX

Technology Selection Workshop

SEP 16-17 | Austin, TX

Technology and Risk Management Showcase

SEP 23-25 | Location TBD

Executive Council '04

SEP 29 | Chicago, IL

Regional Member Meeting

OCTOBER

OCT 7 | Virtual

Member Webinar

OCT 7-9 | Location TBD

Executive Council '14

OCT 18 | Chicago, IL

Private Family Capital Investment Dinner With the Direct Investing Network

OCT 18-19 | Chicago, IL

Rising Gen at the Family Forum

OCT 19-21 | Chicago, IL

Family Forum

OCT 21-22 | Chicago, IL

Owners Council

OCT 28 | Virtual

Fall Family Advisor Training Program (VIRTUAL SESSION 1) **NOVEMBER**

NOV 2-4 | Location TBD

Fall Family Advisor Training Program (IN-PERSON SESSION)

NOV 3-5 | Location TBD

Senior Management Council

NOV 10-13 | Virtual

Family Office Design Workshop **DECEMBER**

DEC 1 | Virtual

Emerging Enterprise Families Cohort

DEC 1 | Virtual

Multi-Gen Business Families Cohort

DEC 8 | Virtual

Early-Stage Business Families Cohort

DEC 8 | Virtual

Established Enterprise Families Cohort

DEC 9 | Virtual

Fall Family Advisor Training Program (VIRTUAL SESSION 2)

(Fall Alumni Session will be held on Feb. 10, 2027)

DEC 10 | Virtual

Financial Families Cohort



