

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	APR 1 Virtual Member Webinar	MAY 4-6 Location TBD Senior Management Council	JUN 2 New York, NY Regional Member Meeting
JAN 20 Virtual Public Webinar	FEB 3 Virtual Multi-Gen Business Families Cohort	MAR 11-13 Location TBD Executive Council '04	APR 7-8 Location TBD Integrated Wealth Advisor Council	MAY 6 Virtual Member Webinar	JUN 9 Virtual Spring Family Advisor Training Program (VIRTUAL SESSION 2)
JAN 22 Virtual Technology Resource Partner Focus Group: FundCount	FEB 4 Virtual Member Webinar	MAR 13-14 Denver, CO Rising Gen Leadership Program (Sapphire Edition)	APR 7-8 Location TBD Global Enterprise Family Council	MAY 11-13 Chicago, IL Spring Family Advisor Training Program (IN-PERSON SESSION)	JUN 10 Virtual Member Webinar
JAN 27-29 Virtual Private Trust Company Workshop	FEB 5 Virtual Early-Stage Business 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 16-18 Chicago, IL Build an Enterprise Family Workshop
JAN 26-30 Miami, FL ROEF Academy: Module 4 Enterprise Strategies, Shared Ownership, and Family Governance	FEB 10 Virtual Established Enterprise Families Cohort	MAR 17-18 West Palm Beach, FL Strategic CIO Council	APR 23 Virtual ROEF Academy: Module 6 Wealth Management and Investment Principles	MAY 19 Virtual Emerging Enterprise Families Cohort	
	FEB 11 San Antonio, TX Regional Member Meeting	MAR 19 Virtual Technology Resource Partner Focus Group: Entitykeeper	APR 28 Chicago, IL Regional Member Meeting	MAY 19 Virtual Multi-Gen Business Families Cohort	
	FEB 12 Virtual Financial Families Cohort	MAR 19 Virtual ROEF Academy: Module 5 Collaboration and Decision-making	APR 28 Virtual Spring Family Advisor Training Program (VIRTUAL SESSION 1)	MAY 21 Virtual Financial Families Cohort	
	FEB 12 Virtual Technology Resource Partner Focus Group: Auria	MAR 25-27 Location TBD Executive Council '14	APR 29-30 New York, NY Industry Leaders Meeting	MAY 28 Virtual Early-Stage Business Families Cohort	
	FEB 18 Virtual Member Webinar	MAR TBD Toronto, ON Regional Member Meeting		May 28 Virtual Established Enterprise Families Cohort	

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