

*Addendum to UHNW Institute Editorial Policies and Guidelines*

**Wealthesaurus™ Guidelines and Procedures**

This document outlines the mission, purpose, content and format of the glossary developed by the UHNW Institute - the Wealthesaurus™ - as well as procedures for handling contributions and suggested edits by Institute members and other users.

**Mission and Purpose:** The UHNW Institute's Mission is to provide an intellectual framework for family wealth management content by helping families and educating advisors on how best to support the ultra-high-net-worth (UHNW) families they serve. Consistent with this, the mission of the Wealthesaurus™ is to provide curated definitions and explanations of common terms, including many that are misunderstood, ambiguous, or poorly defined in the industry. The purpose of the Wealthesaurus™ is to reduce confusion, enhance clarity, and improve communication in the industry and for UHNW families.

**Content Guidelines:** Terms in the Wealthesaurus™ shall adhere to the following general criteria for content:

- Will be written in the English language, using commonly accepted American English spellings.
- Will be written in formal professional style.
- Will limit the use of jargon or ambiguous language.
- Will contain accurate current information supported by reliable objective sources whenever possible.
- Will be written to convey a neutral stance or to reflect disparate positions representative of the field.
- Will not promote any proprietary product, service, individual, or firm.
- Will not be offered as providing legal, financial, tax, accounting, or investment advice.
- Will relate primarily to the UHNW advisory field and apply to UHNW families and professionals. Except for purposes supportive of fulfilling its Mission, terms that are in general usage or are already well-defined elsewhere in the public sphere shall not be included.
- Will undergo drafting, review, and approval by the UHNW Institute.

**Format:** Terms in the Wealthesaurus™ shall adhere to the following format:

- A term **title**, corresponding to current common usage, with alternative spellings if necessary.
- An English language audio **pronunciation** guide.

- A dictionary-style **definition**, helpful to anyone generally unfamiliar with or confused about the term. Definitions will generally not exceed one or two sentences.
- A more detailed **explanation**, providing helpful context about the term's usage, history, controversies, and relevance to the family wealth advising field. For purposes of readability, explanations shall generally remain under 400 words.
- Clickable **links** in the definition and explanation sections to other terms in the Wealththesaurus™, helping to explain embedded terms with which the user may be unfamiliar.
- An optional **See Also** section with suggestions to view similar or related terms.
- Where possible, **references** or citations about relevant readings or resources related to the basis for the definition or explanation of the term.

### Usage and Revision Procedures:

**Usage:** The Wealththesaurus™ and its logo are trademarked by the UHNW Institute. It is currently available only for UHNW Institute Members through the Resource Library site in the Member Portal. It is expected to become available to the public in the future once its terms and usage have been established within the Institute. Institute members are encouraged to explore the glossary and use it to support their work. When referring to the Wealththesaurus™, members should use the following citation format:

The UHNW Institute. "Wealththesaurus™: a Glossary of Family Wealth Advising Terms," 2024. <https://Wealththesaurus.org/>

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**Revising or Adding to the Wealththesaurus™:** Users are encouraged to suggest edits to existing terms or to propose new terms, using the following procedures:

1. Carefully review the existing Wealththesaurus™ definition and explanation to fully understand them and their basis. Also review the Mission, Purpose, Content Guidelines, and Format of the Wealththesaurus™.
2. For **new terms**, check that the term or its synonym is not already included, utilizing the search box if necessary. Write a draft of the definition and explanation for the proposed term. Include information on any resources/references/citations that support the proposed usage of the term and its definition and explanation.

3. For **edits to existing terms**, write the proposed edits in full based upon the current definition or explanation. Edits should be accompanied by reliable, unbiased reference(s) whenever possible.\*
4. Email the proposed new term or suggested edits to the UHNW Institute Librarian (Tara Kehoe: [tkehoe@uhnwinstitute.org](mailto:tkehoe@uhnwinstitute.org)).
5. Proposed terms and edits will be reviewed by UHNW Institute staff and relevant leaders. Submitters may be contacted for discussion and may be asked to submit a second draft of the edit(s) after the review.
6. In case of questions or dissenting views, other senior Institute members with experience in the relevant field will be consulted for their opinion on the revision. After considering the new term or proposed edits with their supporting materials, the Institute staff will make a determination.
7. Submitters will be informed of the decision to accept or reject new terms or edits. They will be shown the final term listing before publication to the Wealthesaurus™.

\* *Example:* Edits to explanation of “ultra-high-net-worth” where the current line reads, “With inflation and the expansion of wealth world-wide, more firms are considering the modern threshold to the UHNW level as \$100 million USD”:  
Suggested edit: “With inflation and the expansion of wealth world-wide, more firms are considering the modern threshold to the UHNW level to be \$150 million USD.”  
This edit is supported by this new report: CapGemini Research Institute World Wealth Report 2026 (link included)”