

# AGENDA

8:30 **Catered Breakfast, Check-In & Pre-Event Networking**

9:00 ***Hyper Local Investor Lead Generation & The Centimillionaire Opportunity***  
Richard C. Wilson - Chairman - The Family Office Club

9:30 ***The Importance of Being Earnest and the Art of the Presentation***  
Lisa Holzwarth, Senior Managing Director, Perkins Fund Marketing

10:00 ***Capital Raising Best Practices***  
David Frank, CFA, CEO & Managing Partner, Stonehaven

10:30 ***Listening to Your Investor and Curating Opportunities that Meet Their Criteria***  
Richard Baum - Managing Partner, Consumer Growth Partners

11:00 ***Top Ten Reasons Investors Say “Yes” to Growth Capital Opportunities***  
Tom Watts, CEO & CIO, Watts Capital

11:30 ***How to Create Authority & Credibility to Supercharge Capital Raising Success***  
Mark Hanf, Fund Manager, Pacific Private Money Fund

12:00 **Catered Lunch and Open Networking**

1:00 ***The Family Office Perspective: Evaluating Funds and Investment Opportunities***  
Ira Perlmutter, Head of Family Office Direct Investing, T5 Equity Partners

1:30 ***Overview of Institutional Private Equity Fund Placement***  
Gregg Solomon, Managing Director, Touchstone Group

2:00 ***How To Raise Capital from Global Family Offices, 10 Master Class Tips from the CEO of a Multi-Family Office***  
Dan Farrell, Chairman & CEO, Privos Capital

2:30 ***Equity 'A Blue Lobster' How Do You Find It?***  
Glenn Hanson, CEO & Founder, Colony Hills Capital

3:00 ***Strategies for Building Successful Investment Firms***  
Charles Eaton, Partner, Eaton Partners

3:30 ***Live Review of Conference Attendee Capital Raising Materials & Strategies***  
Richard C. Wilson, Founder & CEO, The Family Office Club

4:00 **Cocktail Reception and Open Networking**