

# THE FAMILY OFFICE DEAL FLOW SUMMIT

*June 27th - The Edison Ballroom - NYC*



Family Office Club

[www.FamilyOffices.com/Direct](http://www.FamilyOffices.com/Direct)

# The Family Office Deal Flow Summit

Dear Colleague,

Our focus for this year's events is to promote a collaborative, relationship-building environment where family offices and institutional investors can share insights and resources, partner together on deals, and improve their operations with the help of their peers. Once again, we are hosting our annual Family Office Deal Flow Summit in New York City at the Edison Ballroom. The Deal Flow Summit is your chance to network with 25+ family office speakers and 300+ attendees.

## WHO WILL BE SPEAKING:

You will hear from more than 25 family offices through a mix of standalone presentations and intriguing panel discussions. If you have been to one of our conferences, you know that we are dedicated to featuring top institutional investors and family offices presenting on the most pressing topics, from allocation strategies to risk management and best practices for guarding wealth.

## WHO WILL BE ATTENDING:

Our conferences attract institutional investors, family office executives, private equity dealmakers, investment fund managers, high-net-worth individuals, and a variety of family office industry participants. As always, family office executives are welcome to attend and take advantage of the free admission policy. Qualified family offices can sign up to attend for free here: <http://WilsonConferences.com/Family-Office-Registration/>

## BENEFITS OF ATTENDING:

The Deal Flow Summit is your annual opportunity to meet family offices, network with peers in the family office industry, gain valuable insights on the market, and build real relationships that move the needle in your business.

1. **Hear** directly from leading single family offices and top multi-family office executives on how to operate, grow, and invest capital as a family office.
2. **Learn** how to structure co-investments, source deals, and allocate capital both directly and to investment funds. You will see first-hand what criteria top family offices consider while selecting fund managers.
3. **Connect** face-to-face with ultra-wealthy families, family offices, and industry peers to share resources and discuss opportunities to work together.

## WHY REGISTER TODAY?

This event sells out every year and seating is limited so register today to guarantee your spot. You can register online at <http://FamilyOffices.com/Direct> or by giving us a call (305) 503-9077.

*I look forward to seeing you at the Direct Investment & Deal Flow Summit*



Richard C. Wilson  
Founder & CEO  
Wilson Conferences | The Family Office Club  
(212) 729-5067  
328 Crandon Blvd. Ste. #223  
Key Biscayne, Florida 33149



Family Office Club

[www.FamilyOffices.com](http://www.FamilyOffices.com)

# SPEAKERS



**Paul Carbone**  
Pritzker Group



**Neil Wolfson**  
SF Capital Group



**Candice Beaumont**  
L Investments



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**Ira Perlmutter**  
T5 Equity Partners



**Richard C. Wilson**  
The Miami Family Office



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**Gordon Fallone**  
Robertson Stephens



**Matthew McCarthy**  
Rockside Capital Partners



**Cliff Oberlin**  
Oberlin Wealth Partners



**James McKinney**  
McKinney Properties, Inc.



**Fredrico Benavides**  
Beamonte Investments



**Eric Munson**  
NY Based Family Office



**Sasha Bernier**  
Cheltenham Investments



**Geoff Bolton**  
Everline Group



# SPEAKERS



**Sebastian Jano**  
Pardee Resources Company



**Glen Anderson**  
RainMaker Securities



**Ira Kaplan**  
Benesch Law



**Mike VanderLey**  
FTI Consulting



**Jay Goth**  
Forentis Fund



**Gordon "Grant" Curtis** CI  
Investments Company Management



**Mark Rubin**  
FTI Consulting



**Paul Smith**  
NAPLIA



**Karim Ahamed** HPM  
Partners



**Mark Evans**  
Institutional Private Equity Investor



**Steven M. Simmons**  
Sideris Capital Partners



**Derrick Handwerk**  
Handwerk Multi Family Office



**David DeWitt**  
DeWitt Capital Partners



# AGENDA

## 8:00 Catered Breakfast, Check-in & Registration

**9:00** *Inbound Deal Origination - Positioning Your Firm for Daily Inquiries from Asset Principals Looking to Sell*  
Richard C. Wilson, CEO & Head of Direct Investments, The Miami Family Office

**9:20** *Online Lending: Investing in a Fast-Changing Lending Landscape*  
Neil Wolfson, President, SF Capital Group

**9:35** *Why Family Offices Need to Consider Private Investment in Renewable Energy*  
Temple Fennell, Board Member, Investment Committee, Keller Enterprises

**9:50** **Panel Discussion:** *What We're Buying: Family Office Real Estate Investments*  
James McKinney (McKinney Properties, Inc.); Wendy Craft (Gonzalez Family Office); Sasha Bernier (Cheltenham Investments); Mark Rubin (FTI Consulting);

**10:35** *History of VC - A Family Office's Journey Then & Now*  
Eric Munson, Director, NY Based Family Office

**10:50** *Challenges and Opportunities In BioTech*  
Jay Goth, Managing Director, Forentis Fund

**11:05** **Panel Discussion:** *Being Direct: Sourcing Non-Brokered Direct Investment Deal Flow*  
*Panel Moderator:* Ira Kaplan (Benesch Law); *Panelists:* Michael Felman (ShoreFront Capital); Geoff Bolton (Everline Group); Sebastian Jano (Pardee Resources Company); Matthew McCarthy (Rockside Capital Partners);

**11:50** *Energy, Infrastructure, and the Revival of MLPs*  
David DeWitt, Founder & CEO, DeWitt Capital Management

## 12:00 Catered Lunch & Open Networking

**1:00** **Panel Discussion:** *Pitch Me: Family Offices on What Investments They Want*  
Paul Carbone (Pritzker Group); Cliff Oberlin (Oberlin Wealth Partners); Theodore O'Brien (The Detroit Family Office); Karim Ahamed (HPM Partners);

**1:45** **Panel Discussion:** *How Good Deals Go Bad: Limiting Your Risk & Protecting Your Investment*  
Gordon Fallone (Robertson Stephens); Paul Smith (NAPLIA); Mark Evans (Institutional Private Equity Investor); Steven M. Simmons (Sideris Capital Partners);

**2:30** **Panel Discussion:** *Private Capital in Growing Industries*  
Glen Anderson (RainMaker Securities); Gordon "Grant" Curtis (CI Investments Management Company); Candice Beaumont (L Investments)

**3:15** **Panel Discussion:** *Buying at the Bottom: Restructuring, Buying through Bankruptcy & Turning Around Failed Businesses*  
Frederico Benavides (Beamonte Investments); Mike VanderLey (FTI Consulting); Ira Perlmutter (T5 Equity Partners); Derrick Handwerk (Handwerk Multi Family Office);

## 4:00 Cocktail Reception & Open Networking

# THANK YOU TO OUR SPONSORS

## ADVISORY COUNCIL



Paul Smith  
PaulS@NAPLIA.com

ROBERTSON STEPHENS

Gordon Fallone  
GFallone@RSADV.com



Jim Hill  
JHill@beneschlaw.com

## PLATINUM SPONSOR

# Forentis Fund

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# BOOKING FORM

<p><b>The Family Office Deal Flow Summit</b></p>	<p><b>Edison Ballroom NYC</b></p> <hr/> <p><b>June 27<sup>th</sup></b></p>	<p><i>Single Admission</i></p> <p>2016 Event Series</p>
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<b>DELEGATE 1</b>	First Name	Last Name
Firm Name	Phone	Email
<b>DELEGATE 2</b>	First Name	Last Name
Firm Name	Phone	Email

<p><b>BOOKING DETAILS</b></p> <p><b><u>Charter Membership Pass</u></b> Includes admission to all of our conferences and more benefits. (<b>\$385 Initiation, \$197 Monthly</b>)</p>	<p><b>The Family Office Deal Flow Summit   Sept. 27<sup>th</sup>   NYC</b></p> <p>1 Delegate - \$1,195      3 Delegates - \$2,750 2 Delegates - \$1,995      5 Delegates - \$3,950</p> <p><b>Real Estate Allocator Summit   Sept. 2016   NYC</b></p> <p>Super Early-Bird: \$875</p>
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<b>PAYMENT DETAILS</b>		
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### Other Ways to Register

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