



SUPER SUMMIT 2023 AGENDA

December 5th - 7th, 2023 | All Times are EST

Day 1 | Monday December 4th

TIME	TOPIC
4:00 p.m. - 6:00 p.m.	Registration
4:00 p.m. - 6:00 p.m.	Welcome Reception

Day 2 | Tuesday December 5th

TIME	TOPIC	SPEAKER
9:00 a.m.	Registration Opens	
10:00 a.m. - 10:20 a.m.	Opening Remarks	Richard C. Wilson - Family Office Club
10:20 a.m. - 10:35 a.m.	Standalone Presentation	Max Simon - Green Flower Media
10:35 a.m. - 10:50 a.m.	Standalone Presentation	Ken Neumann - Youtopia
10:50 a.m. - 11:05 a.m.	Standalone Presentation	Jason Milton - Custom Capital
11:05 a.m. - 11:40 a.m.	Panel 1 Investor Introductions - Hear from Investors on Exactly What They're Investing In Now	Moderator Charles Wilson - Family Office Club Benjamin M. (Fund of Funds) Keith B. (Head of Investor Club) Todd R. (Private Investor) David D. (Wealth Manager) Alec W. (Private Investor) Ken G. (Private Investor)
11:40 a.m. - 11:55 a.m.	Standalone Presentation	Sylvia B. (SFO)
11:55 a.m. - 12:10 p.m.	The Future of the Family Office Using Tech to Up the Game	Jay Kelly & Ann Oleson - Return on Good
12:10 p.m. - 12:45 p.m.	Panel 2 Doctor's Investor Club - Doctors & Dentists Share What They're Investing In, How They're Growing Their Practices & Why They're Focused on Healthcare Deals	Moderator Richard C. Wilson - Family Office Club Hubert Z. (Angel Investor & Doctor) Eric T. (Doctor) Shane S. (Doctor) Noel L. (Dentist)
12:45 p.m. - 2:00 p.m.	Lunch	
2:00 p.m. - 2:35 p.m.	Panel 3 Pro Athlete Investors - Active and Retired Pro Athletes on Their Investment Goals and Criteria	Moderator Andres Ospina - Family Office Club LaVonne I. (Wealth Manager & Former Olympian) Garrett K. (Family Office & Former Olympian) Tommy M. (MFO) Zane B. (RE Investor & Former NFL Player)



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Day 2 | Tuesday December 5th

TIME	TOPIC	SPEAKER
2:35 p.m. - 3:10 p.m.	Panel 4 \$100 Million+ Strategies - 7 Firms Managing Over \$100M of Assets: What Got Them There, What Is Working Now & Where They Are Headed Next	Moderator Holly Caliendo - Family Office Club
3:10 p.m. - 3:25 p.m.	Standalone Presentation	
3:25 p.m. - 4:00 p.m.	Panel 5 Deal Sourcing Opportunities & Due Diligence in Today's Market	Moderator Dr. Alexandra C. (SFO) Anil D. (Private Investor) Marc H. (Head of Investor Club & Private Investor) Steven S. (MFO) Ken H. (SFO) Adam F. (Private Investor) Marc S. (RE Investor)
4:00 p.m. - 4:20 p.m.	Centimillionaire Fireside Chat with Joel N.	Joel N. (SFO) Richard C. Wilson - Family Office Club
4:20 p.m. - 4:55 p.m.	Panel 6 Big Brother Partners - \$500M and \$1B+ Firms Discuss How They Partner with Smaller Sponsors & Funds	Moderator Joe W. (RE Investor) Brenton S. (RE Investor) Kamil H. (SFO) Alice C. (REIT) Will W. (SFO) Richard C. Wilson, Family Office Club
4:55 p.m. - 5:10 p.m.	Standalone Presentation	Mark H. (Keynote)
5:10 p.m. - 6:10 p.m.	Cocktail Hour	

Day 3 | Wednesday December 6th

TIME	TOPIC	SPEAKER
9:30 a.m.	Registration Opens	
10:00 a.m. - 10:15 a.m.	Opening Remarks	Richard C. Wilson - Family Office Club
10:15 a.m. - 10:35 a.m.	You Can Be Part of History in The Making	Michael Sheppard - Treasure Investments Corp
10:35 a.m. - 10:50 a.m.	Standalone Presentation	



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Day 3 | Wednesday December 6th

TIME	TOPIC	SPEAKER
10:50 a.m. - 11:05 a.m.	Standalone Presentation	Don W. (RE Investor)
11:05 a.m. - 11:40 a.m.	Panel 7 Real Estate Joint Ventures - How 6 Panelists & Our \$1B+ AUM Club Structure JV & Co-GP Deals	Moderator Richard C. Wilson - Family Office Club Alec R. (SFO) Brian W. (MFO) Nick N. (SFO) Irwin B. (SFO) John H. (RE Investor) Joe W. (RE Investor)
11:40 a.m. - 11:55 a.m.	Standalone Presentation	
11:55 a.m. - 12:10 p.m.	Standalone Presentation	
12:10 p.m. - 12:45 p.m.	Panel 8 Niche Investment Strategy Showcase - How Investment Firms are Growing Largely Due to Their Unique Offerings in the Marketplace	Moderator Andres Ospina - Family Office Club Steve Shapiro, Q Capital Jack Hollander, Mountain V Robert Hutchins, ELLAVOZ Impact Capital, LLC
12:45 p.m. - 2:00 p.m.	Lunch	
2:00 p.m. - 2:35 p.m.	Panel 9 AI Reality Check - Where Artificial Intelligence Technology, Commercialization and Investments are Heading	Moderator Charles Wilson - Family Office Club James B. (Private Investor) Jonte H. (Angel Investor) Mike K. (AI Investor) Litan Y. (Private Investor) Dr. Harry K. (AI Investor) Simon L. (Angel) Manoel Suhet, bTd
2:35 p.m. - 2:50 p.m.	Standalone Presentation	
2:50 p.m. - 3:25 p.m.	Panel 10 \$1M Insights - Ultra-Wealthy Investors Share an Insight or Lesson Learned That Can Make or Save \$1 Million	Moderator Dr. Forrest B. (MFO) Kristina R. (Private Investor) Dr. Jacque S. (Doctor & Healthcare Investor) Dr. Alexandra C. (SFO) Mark H. (Author) Suzanne L. (SFO) Richard C. Wilson, Family Office Club
3:25 p.m. - 3:40 p.m.	Standalone Presentation	
3:40 p.m. - 3:55 p.m.	Standalone Presentation	



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TIME	TOPIC	SPEAKER
3:55 p.m. - 4:30 p.m.	Panel 11 Investment Trends - Longevity, Cannabis, Psychedelics, AI/Blockchain, Crypto & Sports Betting	Moderator Daphny Obregon - Family Office Club Sylvia B. (SFO) Dr. Gregory P. (SFO) Ole M. (SFO) Sasha B. (SFO) Eric T. (Doctor & Investment Manager) Neetu P. (SFO)
4:30 p.m. - 4:45 p.m.	8 Leadership Lessons from Climbing the Seven Summits	Bo P. (RE Investor)
4:45 p.m. - 5:20 p.m.	Panel 12 \$1 Billion+ Family Office Panel - Top Family Office Leaders Managing Billions in Capital Each	Moderator Pierre D. (MFO) Dany R. (MFO) Giorgi A. (SFO) Adam Q. (MFO) Ira P. (SFO) John L. (SFO)
5:20 p.m. - 5:35 p.m.	Closing Remarks	Richard C. Wilson - Family Office Club
5:35 p.m. - 6:35 p.m.	Cocktail Hour	

Day 4 | Thursday December 7th

TIME	TOPIC	SPEAKER
9:30 a.m.	Registration Opens	
10:00 a.m. - 10:20 a.m.	Opening Remarks	Richard C. Wilson - Family Office Club
10:20 a.m. - 10:35 a.m.	Standalone Presentation	
10:35 a.m. - 10:50 a.m.	The Ego Mistake: From 8 Figures To \$8.25 Per Hour	Marques O. (Keynote & Former Professional NFL Player)
10:50 a.m. - 11:25 a.m.	Panel 13 Niche Investors - Private & Angel Investors and Family Offices Focused 80% or More on Specific Verticals	Moderator Kamil H. (SFO) Stephanie L. (Angel) Bethann K. (Angel) Alex K. (SFO) Danny M. (Private Investor) Justus P. (Private Investor) Andrew L. (RE Investor)



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TIME	TOPIC	SPEAKER
11:25 a.m. - 12:00 p.m.	Panel 14 Medical Practice Profits - How Investors, Tech Tools & Platforms are Evolving within the Multi-Location Medical Practice Platform Space	Moderator Dr. Jacque S. (Doctor & Healthcare Investor) Richard C. Wilson, Family Office Club Trase B. (Healthcare Investor) Tylor M. (Healthcare Investor)
12:00 p.m. - 12:55 p.m.	Lunch	
12:55 p.m. - 1:30 p.m.	Panel 15 5 Leaders of Investor Clubs Share Insights on How to Work with Them, Groups Like Them & Who Makes it Through Their Screening	Moderator Keith B. (Head of Investor Club) Carl F. (Head of Investor Club) Brittany A. (WM) Jared S. (Head of Angel Group & Angel Investor) John B. (Head of Investor Club & WM) Dr. Forrest B. (MFO)
1:30 p.m. - 2:05 p.m.	Panel 16 \$1B+ Multi-Family Offices & RIAs - Hear from Industry Leading RIAs and MFOs	Moderator Charles Wilson - Family Office Club Paul K. (MFO) Sachin P. (WM) Matt K. (MFO) Cliff O. (WM) Nick B. (ICOC) CJ F. (MFO)
2:05 p.m. - 2:20 p.m.	Closing Remarks	Richard C. Wilson - Family Office Club