



**AGENDA**

All Times are PST  
**March 4<sup>th</sup> - 5<sup>th</sup>, 2025**



**BEVERLY HILLS**  
**SUPER SUMMIT 2025**

FamilyOffices.com

## Evening Welcome Reception | Monday March 3<sup>rd</sup>

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

## Day 1 | Tuesday March 4<sup>th</sup>

| TIME                    | TOPIC   |
|-------------------------|---|
| 9:00 a.m.               | Registration Opens  |
| 10:00 a.m. - 10:20 a.m. | 10 Ways to Get 2x More Traction Out of Every Investor Event You Attend Including This One   |
| 10:20 a.m. - 10:35 a.m. | Standalone Presentation   |
| 10:35 a.m. - 10:55 a.m. | <b>Centimillionaire Fireside Chat: How to Build a \$1 Billion in Assets Platform</b>  |
| 10:55 a.m. - 11:10 a.m. | Standalone Presentation   |
| 11:10 a.m. - 11:45 a.m. | <b>Panel 1   Unlocking Growth Opportunities - Where Family Offices are Investing Next</b>   |
| 11:45 a.m. - 12:00 p.m. | Standalone Presentation   |
| 12:00 p.m. - 12:15 p.m. | Standalone Presentation   |
| 12:15 p.m. - 12:50 p.m. | <b>Panel 2   Investment Trends - Artificial Intelligence, Technology, Robotics, Blockchain, Art and More</b>  |
| 12:50 p.m. - 2:00 p.m.  | Lunch   |
| 2:00 p.m. - 2:35 p.m.   | <b>Panel 3   Real Estate Capital Flow &amp; GP Funds - Strategies &amp; Opportunistic Vehicles That Work Through All Cycles</b>   |
| 2:35 p.m. - 2:50 p.m.   | Standalone Presentation   |
| 2:50 p.m. - 3:25 p.m.   | <b>Panel 4   Niche Investment Strategy Showcase - Investment Sponsors, Funds &amp; Platforms on What is Working Right Now</b>   |
| 3:25 p.m. - 3:40 p.m.   | <b>Super Founder Fireside Chat - Scaling a Platform &amp; Navigating an Exit</b>  |
| 3:40 p.m. - 4:15 p.m.   | <b>Panel 5   Family Office Focused - Learn What Preferred Structures, Strategies and Communication Approaches are Working in Today's Environment from Single and Multi-Family Offices</b> |
| 4:15 p.m. - 4:50 p.m.   | <b>Panel 6   \$1 Billion+ Allocators - Hear Directly from the Largest Family Offices and Investment Firms</b>   |
| 4:50 p.m. - 5:05 p.m.   | <b>Billionaire Fireside Chat: Founder Scaling Strategies &amp; Negotiation Insights from the Co-Founder of E! Entertainment Television</b>  |



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## Day 1 | Tuesday March 4<sup>th</sup>

| TIME                  | TOPIC  |
|-----------------------|--|
| 5:05 p.m. - 5:20 p.m. | Standalone Presentation  |
| 5:20 p.m. - 5:35 p.m. | 15 Artificial Intelligence & Software Tools for Investors & Founders |
| 5:35 p.m. - 6:35 p.m. | Networking Reception   |

## Day 2 | Investor Day | Wednesday March 5<sup>th</sup>

| TIME                    | TOPIC  |
|-------------------------|--|
| 9:30 a.m.               | Registration Opens   |
| 10:00 a.m. - 10:20 a.m. | Deal Negotiation Insights, Structures & Strategies   |
| 10:20 a.m. - 10:40 a.m. | <b>Centimillionaire Fireside Chat: Scaling, Exponential Opportunities &amp; Deal Negotiation</b>   |
| 10:40 a.m. - 10:55 a.m. | Standalone Presentation  |
| 10:55 a.m. - 11:30 a.m. | <b>Panel 7   Professional Athletes - Active and Retired Pro Athletes on Their Investment Goals and Criteria</b>  |
| 11:30 a.m. - 11:45 a.m. | Standalone Presentation  |
| 11:45 a.m. - 12:00 p.m. | Presentation by Joe Williams, Co-Founder of Keller Williams Realty   |
| 12:00 p.m. - 12:35 p.m. | <b>Panel 8   Exponential Investor Panel - Investor Club Leaders Share Insights on How to Work with Them, Groups Like Them &amp; Who Makes it Through Their Screening</b> |
| 12:35 p.m. - 1:40 p.m.  | Lunch  |
| 1:40 p.m. - 2:15 p.m.   | <b>Panel 9   Capital Insights - Exploring the Latest Trends in Private Equity and Venture Capital</b>  |
| 2:15 p.m. - 2:35 p.m.   | <b>Billionaire Fireside Chat</b>   |
| 2:35 p.m. - 3:10 p.m.   | <b>Panel 10   Investor's First Impressions - Watch 10 Brands from Audience Members Get Quickly Rated by Investors Reviewing Deals Daily</b>                              |
| 3:10 p.m. - 3:45 p.m.   | <b>Panel 11   Private Investor Mandates - Preferences and Strategies of Ultra-Wealthy Private Investors</b>  |
| 3:45 p.m. - 3:50 p.m.   | Top 10 Traits & Strategies of Billionaires, Pro Athletes & Family Offices & What They All Do to Be Top .1% Achievers   |
| 3:50 p.m. - 4:50 p.m.   | Networking Reception   |