



Hawaii Family Office Retreat

AGENDA

July 15th, 2025
Honolulu, HI

FamilyOffices.com

Tuesday July 15th

| TIME | TOPIC |
|-------------------------|--|
| 9:00 a.m. | Registration Opens |
| 10:00 a.m. - 10:20 a.m. | How to Gain Investor Super Intelligence: 30 Practical Artificial Intelligence Tools Richard C. Wilson - Family Office Club |
| 10:20 a.m. - 10:35 a.m. | Standalone Presentation |
| 10:35 a.m. - 10:55 a.m. | Centimillionaire Strategy Session |
| 10:55 a.m. - 11:25 a.m. | Panel 1 Growth Focus Finder: How Investors are Leveraging Their Entrepreneurial Roots, NextGen Family Members & Unique Models to Allocate & Scale |
| 11:25 a.m. - 12:05 p.m. | Small Group Activity / Speed Networking |
| 12:05 p.m. - 12:35 p.m. | Panel 2 Private Investor Insights - Preferences and Strategies of Ultra-Wealthy Investors |
| 12:35 p.m. - 1:50 p.m. | Lunch |
| 1:50 p.m. - 2:20 p.m. | Panel 3 Trending Allocation Areas |
| 2:20 p.m. - 2:35 p.m. | Standalone Presentation |
| 2:35 p.m. - 3:05 p.m. | Panel 4 Founder & Investor Scaling Strategies - Who is Investing, What's Working, What is Trending and What's Next |
| 3:05 p.m. - 3:20 p.m. | Standalone Presentation |
| 3:20 p.m. - 3:45 p.m. | Centimillionaire Strategy Session |
| 3:45 p.m. - 4:15 p.m. | Panel 5 Finding the Right Direct and Co-Investing Opportunities |
| 4:15 p.m. - 4:30 p.m. | Standalone Presentation |
| 4:30 p.m. - 5:00 p.m. | Panel 6 Family Office Investor Mandates & Strategies |
| 5:00 p.m. - 5:15 p.m. | 10 Proven Strategies to Scale Your Platform & Net Worth Faster Richard C. Wilson - Family Office Club |
| 5:15 p.m. - 6:15 p.m. | Networking Reception |