



Family Office Club

Capital Raising Mastery

Workshop

AGENDA

June 17th - Fort Lauderdale, FL

June 18th - Dallas, TX

June 20th - New York City

TIME	TOPIC
9:30 a.m.	Registration & Networking
10:00 a.m. - 10:20 a.m.	Top 5 reframes to think differently about investors, Top 5 mistakes everyone makes while raising capital, and 3 artificial intelligence tools to help that are included in your membership
10:20 a.m. - 10:30 a.m.	Positioning Power: How to attract capital vs. chase it, what draws investors in, recent case study of our member who struggled to raise \$5M, changed positions and raised \$55M since
10:30 a.m. - 10:45 a.m.	Capital Raising Materials Checklist - Audit what you have, what you may need next and create a top 3 action item plan to level-up your communications with investors
10:45 a.m. - 11:15 a.m.	Family Office Deal Case Studies: How to Close More \$500k, \$1M, \$5M and \$10M+ Checks from Centimillionaires & Up
11:15 a.m. - 11:45 a.m.	After 1,000 hours of studying influence and persuasion and 18 years running our investor club - Here are the 5 most important investor relations & capital raising insights that work
11:45 a.m. - 12:15 p.m.	Custom Deal Structure Success: 5 examples of restructuring deals to close investors who said no, and 1 artificial intelligence tool that is a game changer to make you 10x faster and more creative on structuring your next raise
12:15 p.m. - 12:30 p.m.	Crystal Clear Advantage, Reversing the Flow of Investor Demand, Power Brokers, and Joint Ventures
12:30 p.m. - 1:00 p.m.	30 Minute Lunch Networking Session
1:00 p.m. - 1:15 p.m.	The #1 strategy to attract investors - the holy grail of capital raising as one \$1B+ capital raiser put it
1:15 p.m. - 1:30 p.m.	DD Advantage: 4 things nobody does that every single investor you talk to will appreciate while considering to invest with you or not.
1:30 p.m. - 1:45 p.m.	Our investor club's list of tech services to move faster, our investor pipeline builder, investor club navigator, family office finder, and copilot tools
1:45 p.m. - 2:15 p.m.	3 Super Powers to Raise More Capital, How to Close 16x More Often + What Nobody Wants To Do But Works
2:15 p.m. - 2:30 p.m.	1 out of 1,000 Opportunities, Ways to Add Value 1st, & Choke Points [AI Tool Available Free with membership]
2:30 p.m. - 3:15 p.m.	Implementation Worksheet - Top 3 and top 10 action items and changes in strategy to act on after the workshop
3:15 p.m. - 3:30 p.m.	Social Media, Advertising, Top Channels & \$1M Mistakes
3:30 p.m. - 4:00 p.m.	Round Table Discussion: Top Insights & New Strategies From The Day