



# Hawaii Family Office Retreat

AGENDA

July 15<sup>th</sup>, 2025  
Honolulu, HI

FamilyOffices.com

## Tuesday July 15<sup>th</sup>

TIME	TOPIC	SPEAKER
9:00 a.m.	Registration Opens	
10:00 a.m. - 10:15 a.m.	<b>How to Gain Investor Super Intelligence: 30 Practical Artificial Intelligence Tools</b>	<b>Richard C. Wilson</b> - Family Office Club
10:15 a.m. - 10:30 a.m.	<b>HelixPlus: Unlocking the Future of Science Entertainment</b>	<b>Antonio Buchanan</b> - HelixPlus
10:30 a.m. - 10:35 a.m.	<b>Deal Flow Talk</b>	<b>Rey 'R.T.' Trevino</b> - Pecos Valley Partners
10:35 a.m. - 10:55 a.m.	<b>Centimillionaire Strategy Session</b>	<b>Daniel Kaufman</b> - Kaufman Family Office <b>Richard C. Wilson</b> - Family Office Club
10:55 a.m. - 11:25 a.m.	<b>Panel 1   Growth Focus Finder: How Investors are Leveraging Their Entrepreneurial Roots, NextGen Family Members &amp; Unique Models to Allocate &amp; Scale</b>	
11:25 a.m. - 12:05 p.m.	<b>Small Group Activity / Speed Networking</b>	
12:05 p.m. - 12:35 p.m.	<b>Panel 2   Private Investor Insights – Preferences and Strategies of Ultra-Wealthy Investors</b>	
12:35 p.m. - 1:50 p.m.	Lunch	
1:50 p.m. - 2:20 p.m.	<b>Panel 3   Sector Spotlights: Identifying High-Potential Markets for Strategic Allocation</b>	
2:20 p.m. - 2:35 p.m.	<b>Presentation by Excite</b>	<b>Nadab Akhtar</b> - Excite (formerly Old Parkland Capital)
2:35 p.m. - 3:05 p.m.	<b>Panel 4   Founder &amp; Investor Scaling Strategies - Who is Investing, What's Working, What is Trending and What's Next</b>	
3:05 p.m. - 3:20 p.m.	<b>Presentation by Empyrean Medical Systems, Inc.</b>	<b>Kal Fishman</b> - Empyrean Medical Systems, Inc.
3:20 p.m. - 3:40 p.m.	<b>Scaling by Partnering with \$100M+ \$1B+ Family Offices - 7 Joint Venture, Growth &amp; Capital Network Insights</b>	<b>Brian Mac Mahon</b> - Expert DOJO - VC Arm of \$1B+ Single Family Office



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3:40 p.m. - 4:10 p.m.	<b>Panel 5   Finding the Right Direct and Co-Investing Opportunities</b>	
4:10 p.m. - 4:15 p.m.	Top 5 Insights After 25 years in Upstream Energy	<b>Joe Dumesnil</b> - Overland Oil & Gas
4:15 p.m. - 4:30 p.m.	Centimillionaire Fireside Chat	<b>Patrick O'Meara</b> - Patrick Ventures FO <b>Richard C. Wilson</b> - Family Office Club
4:30 p.m. - 5:00 p.m.	<b>Panel 6   Family Office Investor Mandates &amp; Strategies</b>	
5:00 p.m. - 5:15 p.m.	<b>10 Proven Strategies to Scale Your Platform &amp; Net Worth Faster</b>	<b>Richard C. Wilson</b> - Family Office Club
5:15 p.m. - 6:15 p.m.	Networking Reception	