



Investor Club Summit

FamilyOffices.com

September 16th - 17th, 2025 | Beverly Hills, CA

AGENDA

Evening Welcome Reception | Monday September 15th

TIME

TOPIC

4:00 p.m. - 6:00 p.m.

Registration

4:00 p.m. - 6:00 p.m.

Welcome Reception

Day 1 | Tuesday September 16th

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. - 10:25 a.m.

Vineyard Opportunities: Lower Costs, Tax Advantages & Flexible Exits

Tom Heshion - Arizona Mountain Vineyards

10:25 a.m. - 10:30 a.m.

Land Development Opportunities & Trends

Brandon Rooks - Rockstar Capital Group

10:30 a.m. - 10:35 a.m.

Questing: Experiential Real-Life Gaming Trends

David Spigner - Boda Borg Corporation

10:35 a.m. - 10:55 a.m.

Centimillionaire Strategy Session - What it Took to Scale & Exit a \$100M+ Platform

Michael Scott - Growth Sync Capital
Richard C. Wilson - Family Office Club

10:55 a.m. - 11:10 a.m.

AI-Driven Trading: Anticipating Markets in Real Time

Nadab Akhtar - Excite

11:10 a.m. - 11:45 a.m.

Panel 1 | Supercharging Your Investment Opportunity Set – How to See Deals Nobody Else Gets To

Moderator | Marc Halpern - Deep Due Diligence Investors Club
Brenton S.
Kyle E.
Dan G.
Jacob P.
Kay M.

11:45 a.m. - 11:50 a.m.

Alternative Real Estate: Why Mobile Home Parks Outperform in Any Market

Jack Martin - 52TEN

11:50 a.m. - 11:55 a.m.

Bitcoin Is Not a Bet. It's a 100-Year Allocation

Eric Runge - Veritas Bitcoin Strategies



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TIME	TOPIC	SPEAKER
11:55 a.m. - 12:00 p.m.	The X Factor in Oil & Gas: Purpose, Partners & Performance	Gary Covert - Southwest Alternatives
12:00 p.m. - 12:35 p.m.	Panel 2 Family Office Focus – Structures, Strategies & Communication That Work Today	Moderator John Milanovich - Family Office Club Shirley H. Steven L. Puja S. Laurence R. Heath G.
12:35 p.m. - 1:50 p.m.	Lunch	
1:50 p.m. - 2:25 p.m.	Panel 3 Hot Trends Investors Are Eating Up	Moderator Charles Wilson - Family Office Club Gilad B. Jeff T. Michael G. Lloyd S. Lisa W.
2:25 p.m. - 2:30 p.m.	5 Minute Deal Flow Talk	Paul Lippe - xMentium
2:30 p.m. - 2:35 p.m.	Investing in Invention: Patented Technologies with Global Impact	David Munson - FOI Group LLC
2:35 p.m. - 2:40 p.m.	5 Minute Deal Flow Talk	Scott Barrack - Relevant Partners
2:40 p.m. - 3:15 p.m.	Panel 4 Niche Investment Strategy Showcase – What's Working Right Now	Moderator: John Milanovich - Family Office Club Brandon Brittingham - Redicio Fund
3:15 p.m. - 3:30 p.m.	Centimillionaire Strategy Session	
3:30 p.m. - 4:05 p.m.	Panel 5 Private Investor Insights – Preferences and Strategies of Ultra-Wealthy Investors	Moderator Richard C. Wilson - Family Office Club Mark W. Richard S. Isaac R. John B. Kip K.
4:05 p.m. - 4:10 p.m.	Next-Gen Private Equity: Strategies & Emerging Opportunities	
4:10 p.m. - 4:15 p.m.	Real Estate 2.0: Investment Trends & Niche Opportunities	



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Day 1 | Tuesday September 16th

TIME	TOPIC	SPEAKER
4:15 p.m. - 4:20 p.m.	Healthcare Innovation & Longevity: Investing in the Future of Wellbeing	
4:20 p.m. - 4:55 p.m.	Panel 6 Real Estate Capital Flow & GP Funds - Strategies That Work Through All Cycles	Moderator Andres Ospina - Family Office Club Joe A. J.D. S. George P.
4:55 p.m. - 5:10 p.m.	Closing Remarks	Richard C. Wilson - Family Office Club
5:10 p.m. - 6:10 p.m.	Networking Reception	

Day 2 | Investor Day | Wednesday September 17th

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. - 10:40 a.m.	To Be a Champion You Need Hustle, Reinvention, and Tenacity	Metta World Peace - Artest Management Group (Former NBA All Star)
10:40 a.m. - 10:45 a.m.	Technology & AI: Next-Generation Forces Shaping Investment	
10:45 a.m. - 10:50 a.m.	Energy & Sustainability: Growth Markets Redefining the Future	
10:50 a.m. - 10:55 a.m.	Wealth Preservation Reimagined: Family Office Strategies for the Next Generation	
10:55 a.m. - 11:30 a.m.	Panel 7 Investor Platform Insights - Experts Running, Partnering With, and Investing through Multi-Family Offices, Investor Clubs, and Other Allocator Platforms	Moderator John B. Natalia S. Kyle S. Russell B. Ronald B. Avneet K.



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TIME	TOPIC	SPEAKER
11:30 a.m. - 11:35 a.m.	Secondaries & Liquidity: Unlocking Value in Private Markets	
11:35 a.m. - 11:40 a.m.	Venture Capital Evolution	
11:40 a.m. - 11:45 a.m.	Global Markets: Emerging Economies Driving the Next Wave of Growth	
11:45 a.m. - 12:20 p.m.	Panel 8 Pro Athlete Investors - Active and Retired Pro Athletes on Their Investment Criteria & Winning Mindset	Moderator Daniel P. Jason M. Rashad J. Jarrod B.
12:20 p.m. - 1:25 p.m.	Lunch	
1:25 p.m. - 2:00 p.m.	Panel 9 Deal Structure Rating Panel: Feedback on Legal Structures, Fee Splits + Unique Offerings	Moderator Richard C. Wilson - Family Office Club Jack W. Dan G. Sahil N.
2:00 p.m. - 2:05 p.m.	Next Agricultural Revolution	
2:05 p.m. - 2:10 p.m.	Preparing Family Enterprises for the Future	
2:10 p.m. - 2:15 p.m.	Consumer Lifestyle & Wellness Brands	
2:15 p.m. - 2:50 p.m.	Panel 10 Technology, Innovation & A.I. Investment Opportunities	Moderator: John Milanovich - Family Office Club Tracey V. James B. Jenn B. A.J. D. Ira R.
2:50 p.m. - 3:25 p.m.	Panel 11 Driving Growth with Private Equity and Venture Capital - Deal Structures + Opportunities	Moderator Andres Ospina - Family Office Club Ken G. Brian M. Alan S.
3:25 p.m. - 3:40 p.m.	Closing Remarks	Richard C. Wilson - Family Office Club
3:40 p.m. - 4:40 p.m.	Networking Reception	