



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.	Advanced Investor Strategies + Ready-to-Use Artificial Intelligence Tools for Due Diligence + Deal Making	Richard C. Wilson - Family Office Club
10:20 a.m. - 10:25 a.m.	Providing Exceptional Returns Through Value-Add Apartment Buildings In Connecticut	Tyler Smith - Alpha Capital
10:25 a.m. - 10:30 a.m.	Passive Income on Dirt	Brandon Rooks - Rockstar Capital Group
10:30 a.m. - 10:35 a.m.	In Reality, Investment "Exceptions" in a Game Changing	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 S. Richard C. Wilson - Family Office Club
10:55 a.m. - 11:10 a.m.	Presentation by Excite	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 H. Kyle E. Dan G. Jack W. Brian M.
11:45 a.m. - 11:50 a.m.	Manufactured Housing Communities	Jack Martin - 52TEN
11:50 a.m. - 11:55 a.m.	Owning No Bitcoin = An Unseen Bet on Fiat	Eric Runge - Veritas Bitcoin Strategies
11:55 a.m. - 12:00 p.m.	The X Factor in Oil & Gas: Purpose, Partners & Performance	Gary Covert - Southwest Alternatives



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Day 1 | Tuesday September 16th

TIME	TOPIC	SPEAKER
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 Steven L. Puja S. Heath G. Dr. Alexandra C.
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 Jeff T. Michael G. Lloyd S. Lisa W. Connie H.
2:25 p.m. - 2:30 p.m.	xMentium: Language Intelligence for the Enterprise – the Only Sensible GenAI Investment for a Family Office	Paul Lippe - xMentium
2:30 p.m. - 2:35 p.m.	Transforming Industries Through Breakthrough Patents & Startup Incubation	David Munson - FOI Group LLC
2:35 p.m. - 2:40 p.m.	Acanthus Senior Living	Patrick O'Meara - Patrick Ventures
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 Nadab Akhtar - Excite Brandon Rooks - Rockstar Capital Group Rey Trevino - Pecos Valley Partners
3:15 p.m. - 3:30 p.m.	Strategy Session: How to Scale, Sell a Business, and be Ultra Healthy and Wealthy	Dat N. Richard C. Wilson - Family Office Club
3:30 p.m. - 4:05 p.m.	Panel 5 Private Investor Insights – Preferences and Strategies of Ultra-Wealthy Investors	Moderator Dr. Alexandra C. Mark W. Isaac R. John B. Kip K. Bryan M.



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4:05 p.m. - 4:10 p.m.	Selling a Dream... Filling a Need How Jaman Properties is Meeting Demand for Luxury Homes after the Palisades Fire	Michael Manheim & Janus Cercone - Jaman Properties
4:10 p.m. - 4:15 p.m.	Aphios Pharma LLC Series A	Trevor Castor - Aphios Pharma LLC
4:15 p.m. - 4:20 p.m.	HelixPlus: World's First Interactive Science Streaming Platform	Ashley Thornhill - HelixPlus
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 Daniel N. J.D. S. George P. Arya R. Neal B.
4:55 p.m. - 5:10 p.m.	Dewey 2.0: Your Instant Due Diligence Advisor - Leveraging Artificial Intelligence for Quick Vetting + Screening of Opportunities	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.	HyperIntelligent: Instant 20 Person Advisory Board	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 W.
10:40 a.m. - 10:45 a.m.	Multifamily Investing: Generational Wealth vs. Short-Term Gains; Which is right for you?	Sean Alibrando - Dallas Multifamily Investments
10:45 a.m. - 10:50 a.m.	5 Minute Deal Flow Talk	Kirby Sommerfeld - Sophic Wealth Group



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TIME	TOPIC	SPEAKER
10:50 a.m. - 10:55 a.m.	Bulk Whiskey - A Compelling Alternative Investment Opportunity	Chuck Morton & Chip Hamm - North American Whiskey Fund LP
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.
11:30 a.m. - 11:35 a.m.	5 Minute Deal Flow Talk	Mark Smeltzer - Baby Shower The Movie Issuer LLC
11:35 a.m. - 11:40 a.m.	Relevant Partners	Mitch Speigle - Relevant Partners
11:40 a.m. - 11:45 a.m.	5 Minute Deal Flow Talk	
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. Kenny A.
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. Michael S. Sean D.
2:00 p.m. - 2:05 p.m.	Gaming Company Project Financing Opportunity	Zach Belanger - Mob Entertainment
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.



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TIME	TOPIC	SPEAKER
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 Alan S. Daniel K. Isaac R. Natalia S. Ash S.
3:25 p.m. - 3:40 p.m.	Top 10 Notes From The Summit	Richard C. Wilson - Family Office Club
3:40 p.m. - 4:40 p.m.	Networking Reception	