



The 12th Annual Family Office Super Summit 2025

December 9th - 11th, 2025
Fort Lauderdale, FL

AGENDA

FamilyOffices.com

Welcome Networking Reception | Monday December 8th

TIME	TOPIC
4:00 p.m. - 6:00 p.m.	Registration
4:00 p.m. - 6:00 p.m.	Welcome Reception

Day 1 | Tuesday December 9th

TIME	TOPIC	SPEAKER
9:00 a.m.	Registration Open and AI Supported Speed Networking	
10:00 a.m. - 10:05 a.m.	Welcome Remarks	Richard C. Wilson - Family Office Club
10:05 a.m. - 10:20 a.m.	You Can Be Part of History in the Making	Michael Sheppard - Treasure Investments
10:20 a.m. - 10:30 a.m.	Investor Super Intelligence: How to Grow 33% Faster With Artificial Intelligence	Richard C. Wilson - Family Office Club
10:30 a.m. - 10:45 a.m.	Quantum-Sensory AI for Capital Markets Turning Market Volatility into Real-Time Advantage	Nadab Akhtar - Excite (formally Old Parkland Capital)
10:45 a.m. - 11:05 a.m.	Strategy Session	
11:05 a.m. - 11:10 a.m.	Self Storage Passive Investments with Impact	James Reid - Investa Capital
11:10 a.m. - 11:15 a.m.	In Reality, Investment "Exceptions" in a Game Changing World	David Spigner - Boda Borg Corporation
11:15 a.m. - 11:50 a.m.	Panel 1 \$1M+ Check Writers - What Do Those Investing \$1M-\$10M+ per Deal Want Right Now, Current Mandates & Requests for Deal Flow	
11:50 a.m. - 11:55 a.m.	Aphios Pharma LLC Series A	Trevor Castor - Aphios Pharma LLC
11:55 a.m. - 12:00 p.m.	Top Insights From 30 Years in Wealth & Hedge Fund Management	Steve Landa - Startech Environmental
12:00 p.m. - 12:35 p.m.	Panel 2 Single Family Office Capital - Who They Trust, Where They're Allocating in 2026, How They Think Differently than Every Other Type of Investor	



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TIME	TOPIC	SPEAKER
12:35 p.m. - 12:40 p.m.	Solving Problems through Real Estate and Design	Brian Schall - Nelson Construction & Development
12:40 p.m. - 12:45 p.m.	Transforming Industries Through Breakthrough Patents & Startup Incubation	David Munson - FOI Group LLC
12:45 a.m. - 2:00 p.m.	Lunch	
2:00 p.m. - 2:35 p.m.	Panel 3 Niche Investors - Private & Angel Investors and Family Offices Focused 80% or More on Specific Verticals	
2:35 p.m. - 2:40 p.m.	Investing in Big, Bold, and Resilient Ideas	Ed Dua - IA Seed Ventures
2:40 p.m. - 2:45 p.m.	A Fixed Income Alternative by Investing in Renewable Energy Projects Which Power Bitcoin Mining	Patrick Hidalgo - Freights Bay Digital Asset Management
2:45 p.m. - 3:20 p.m.	Panel 4 Scaling Strategies & Direct Investment Trends: How Founders and Family Offices Are Reshaping the Capital Landscape	
3:20 p.m. - 3:40 p.m.	Centimillionaire Strategy Session with a Shark: Time Management, Deal Structures, and Negotiating Transactions	Kevin Harrington - Original Investor Shark on "Shark Tank" and Founder of "As Seen on TV" Richard C. Wilson - Family Office Club
3:40 p.m. - 3:55 p.m.	Breakthrough Biotech Medicine: Treating the Cause of Death of 65% of all Adults	Daniel Montano - Zhittya Genesis Medicine Inc.
3:55 p.m. - 4:30 p.m.	Panel 5 Investing in 2026 and Beyond - Hear From These Top Investors on Their Goals and Criteria	
4:30 p.m. - 4:35 p.m.	MySafe – “Thinking Inside the Box”	Terry Downes - MySafe Global Vaults LLC
4:35 p.m. - 4:40 p.m.	Aurora Private Wealth: Illuminating Your Financial Future"	Timothy Smith - Aurora Private Wealth
4:40 p.m. - 5:15 p.m.	Panel 6 AI Reality Check - Where Artificial Intelligence Technology, Commercialization and Investments are Heading	
5:15 p.m. - 5:30 p.m.	Closing Remarks	Richard C. Wilson - Family Office Club
5:30 p.m. - 6:30 p.m.	Networking Reception	



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Day 2 | Wednesday December 10th

TIME	TOPIC	SPEAKER
9:30 a.m.	Registration Open and AI Supported Speed Networking	
10:00 a.m. - 10:20 a.m.	Opening Remarks	Richard C. Wilson - Family Office Club
10:20 a.m. - 10:35 a.m.	Global Medical Concierge Practice: The Definitive Head-of-State Experience	Margot Borden - Crisis24
10:35 a.m. - 10:55 a.m.	Centimillionaire Fireside Chat: Scaling Rapidly + Navigating Exits With Strategic Buyers	Danny Mikhail - Melka Capital Richard C. Wilson - Family Office Club
10:55 a.m. - 11:00 a.m.	How to Build Wealth with Passive, Fixed-Income Real Estate Investments	Charles Cefalu - AMERISTAR
11:00 a.m. - 11:05 a.m.	Real Estate 2.0: Investment Trends & Niche Opportunities	
11:05 a.m. - 11:40 a.m.	Panel 7 Family Office Investment Focus - Case Studies of Opportunities in Direct Investments vs. Joint Venture vs. Funds	
11:40 a.m. - 11:45 a.m.	Healthcare Innovation & Longevity: Investing in the Future of Wellbeing	
11:45 a.m. - 11:50 a.m.	Technology & AI: Next-Generation Forces Shaping Investment	
11:50 a.m. - 12:25 p.m.	Panel 8 Investor Club Capital - Tap Into the Most Exponential Source of Capital by Hearing What Opportunities, Structures and Teams They Want to See More Of	
12:25 p.m. - 12:30 p.m.	Energy & Sustainability: Growth Markets Redefining the Future	
12:30 p.m. - 12:35 p.m.	Wealth Preservation Reimagined: Family Office Strategies for the Next Generation	
12:35 p.m. - 1:50 p.m.	Lunch	
1:50 p.m. - 2:25 p.m.	Panel 9 Professional Athlete Capital - Where do Athletes Invest, Who Do They Trust, and How to Network and Partner with Them	
2:25 p.m. - 2:30 p.m.	Secondaries & Liquidity: Unlocking Value in Private Markets	





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Day 2 | Wednesday December 10th

TIME	TOPIC	SPEAKER
2:30 p.m. - 2:35 p.m.	Venture Capital Evolution	
2:35 p.m. - 2:55 p.m.	Centimillionaire Fireside Chat: Top 7 Mistakes Made by Investors + 5 Things Only the Ultra-Wealthy Do	Paul Karger - Twin Focus Richard C. Wilson - Family Office Club
2:55 p.m. - 3:30 p.m.	Panel 10 Alternative Assets & Emerging Opportunities: Unlocking Alpha in Niche Funds, Private Credit & Fast-Scaling Ventures	
3:30 p.m. - 3:35 p.m.	Global Markets: Emerging Economies Driving the Next Wave of Growth	
3:35 p.m. - 3:40 p.m.	Next Agricultural Revolution	
3:40 p.m. - 4:15 p.m.	Panel 11 Real Estate LPs & Allocators - A Discussion of Investor Mandates, AI, Deal Structures	
4:15 p.m. - 4:30 p.m.	Closing Remarks	Richard C. Wilson - Family Office Club
4:30 p.m. - 5:30 p.m.	Networking Reception	

Day 3 | Investor Day | Thursday December 11th

TIME	TOPIC	SPEAKER
9:30 a.m.	Registration Open and AI Supported Speed Networking	
10:00 a.m. - 10:20 a.m.	Opening Remarks	Richard C. Wilson - Family Office Club
10:20 a.m. - 10:35 a.m.	Insights from Scaling from 0 to 150+ T-Mobile Stores & an Exit	Todd Heiner - Ridgeline Capital Group
10:35 a.m. - 10:40 a.m.	Preparing Family Enterprises for the Future	
10:40 a.m. - 10:45 a.m.	Consumer Lifestyle & Wellness Brands	
10:45 a.m. - 11:20 a.m.	Panel 12 Surf's Up - Investors Discuss How They Are Profiting on Waves of Change Coming, Explosive New Industries, Fast-Growing Niches & the Inevitable Future Others Don't See Coming	





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Day 3 | Investor Day | Thursday December 11th

TIME	TOPIC	SPEAKER
11:20 a.m. - 11:25 a.m.	AI-Driven Trading: Anticipating Markets in Real Time	
11:25 a.m. - 11:30 a.m.	The Ultra-Wealthy Playbook: What They Do Differently	
11:30 a.m. - 12:05 p.m.	Panel 13 Investor's First Impressions - Watch 10 Brands from Audience Members Get Quickly Rated by Investors Reviewing Deals Daily	
12:05 p.m. - 1:20 p.m.	Lunch	
1:20 p.m. - 1:55 p.m.	Panel 14 Multi-Family Offices and Wealth Managers - How They Select Investments & Deals To Present To Clients	
1:55 p.m. - 2:10 p.m.	5 Secrets to Help You Think Like a Navy SEAL	William Branum - Former Navy Seal
2:10 p.m. - 2:15 p.m.	Recession-Proof Portfolios: Positioning for What's Next	
2:15 p.m. - 2:50 p.m.	Panel 15 Debt, Credit & Income Investing - Investors Allocating to this Area on Return Expectations, Mandates and Areas of Additional Interest Moving into Next Year	
2:50 p.m. - 3:20 p.m.	Panel 16 Hear from Ultra-Wealthy Investors on How They Conduct Due Diligence, Where They are Investing Today and How to Stand Out in an Inbox of 500 Pitches a Day	
3:20 p.m. - 3:35 p.m.	Closing Remarks	Richard C. Wilson - Family Office Club
3:35 p.m. - 4:35p.m.	Networking Reception	