



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.	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
11:05 a.m. - 11:10 a.m.	Self Storage: The Top Wealth Preservation Asset of the Decade	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	Moderator John Lettera - RE Investor Alec W. - Private Investor Paul G. - Angel Investor LaVonne I. - Private Investor Kamil H. - SFO
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



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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	Moderator Dr. Alexandra Cook - SFO Jody C. - SFO Cliff O. - SFO Irwin B. - SFO Tom B. - MFO Brenton S. - RE Investor
12:35 p.m. - 12:40 p.m.	From Crisis to Catalyst: Turning the Addiction Epidemic into Impactful Investment	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 p.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	Moderator Nazar "Nick" Nazarov Hubert Z. - Angel Investor Patrick H. - SFO Ron T. - Angel Investor James N. - Private Investor Joel D. - Investor
2:35 p.m. - 2:40 p.m.	Investing in Private Early-Stage AI Companies with 100x potential	Ed Dua - IA Seed Ventures
2:40 p.m. - 2:45 p.m.	An Institutional Path to Generating Bitcoin Yield from Clean Energy	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	Moderator Lisa Carmen Wang - Head of Investor Club Jeremiah W. - Former Pro Athlete & Investor Silvia L. - Wealth Manager Sasha B. - SFO David D. - Wealth Manager Ed L. - Fintech Investor



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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	Moderator Kyle E. - Angel Investor Simon L. - Private Investor Shane N. - SFO James B. Private Investor
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	

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.	Access to Worlds Best Medical Care, Any Time, Anywhere	Dr. Bill Lang - Crisis24 Private Strategic Group
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.	Creating Financial Independence Through Private Lending	Charles Cefalun - Ameristar Capital Income Fund
11:00 a.m. - 11:05 a.m.	Real Estate 2.0: Investment Trends & Niche Opportunities	Nora Abou Chakra - VIPMINDS
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	Moderator Kamil Homsy - SFO Carl F. - Investor Club Head Alex K. - SFO Andrew E. - SFO Randy A. - SFO Yahya M. - SFO



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Day 2 | Wednesday December 10th

TIME	TOPIC	SPEAKER
11:40 a.m. - 11:55 a.m.	It's not about what you make. It's about what you keep. Advance Asset-protection strategies.	Vincent Munno - Simplicity UFC
11:55 a.m. - 12:30 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	Moderator Marc Halpern - Deep Due Diligence Investors Michael K. - Private Investor John B. - Investor Club Head Lisa C. - Investor Club Head
12:30 p.m. - 12:35 p.m.	Disrupting Radiation Oncology. For Good!	Kal Fishman - Empyrean Medical Systems, Inc.
12:35 p.m. - 12:40 p.m.	Oil Brief: Global Dynamics Lunch	Rey Trevino - Pecos Valley Partners
12:40 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	Moderator Daniel Puder - Pro Athlete Investor Brent W. - Pro Athlete Investor Malcolm L. - Pro Athlete Investor Ryan N. - Pro Athlete Investor Mike O. - Pro Athlete Investor Otis G. - Pro Athlete Investor Rennie C. - Pro Athlete Investor Frank M. - Pro Athlete Investor
2:25 p.m. - 2:30 p.m.	Secondaries & Liquidity: Unlocking Value in Private Markets	
2:30 p.m. - 2:35 p.m.	Venture Capital Evolution	
2:35 p.m. - 2:55 p.m.	Fireside Chat	
2:55 p.m. - 3:30 p.m.	Panel 10 Alternative Assets & Emerging Opportunities: Unlocking Alpha in Niche Funds, Private Credit & Fast-Scaling Ventures	Moderator John Milanovich
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	Moderator Joe Williams JD S. - SFO John L. - RE Investor Dan G. - MFO
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	





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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.	0 to 150 Wireless Retail Locations and a 9 Figure Exit in 8 Years	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	Moderator Joe W. - RE Investor Richard S. - Family Office Advisor Randy R. - Private Investor David S. MFO
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	Moderator Richard C. Wilson Bill L. - Private Investor William N. - Private Investor
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	Moderator John Milanovich Jonathan B. - MFO Molly G. - MFO Brett R. MFO
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	Moderator John Bowens - Investor Club Head James K. - Private Investor Nazar "Nick" N. - SFO



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TIME	TOPIC	SPEAKER
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	Moderator Charles Wilson Candice B. - SFO Marc H. - Investor Club Head Brian W. - Wealth Advisor Dan G. - MFO
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	