



The Family Office Formula

FamilyOffices.com

AGENDA

November 4th, 2025
Dallas, TX

TIME	TOPIC
10:00 a.m. - 10:10 a.m.	Welcome Address from Carr, Riggs & Ingram
10:10 a.m. - 10:30 a.m.	Family Office Formula: Overview, What Disrupts the Formula, What Not to Do
10:30 a.m. - 10:45 a.m.	Top 7 Insights on Closing Deals with Pro Athletes, Decamillionaires, and How to Connect With And Add Value to Celebrity Investors to Build Relationships Lamarr Houston - Boxxtech
10:45 a.m. - 11:25 a.m.	Family Office Formula Fundamentals: What are the 7 building blocks at the core of wealth creation?
11:25 a.m. - 12:05 p.m.	Breakout Session + Worksheet Completion + Networking
12:05 p.m. - 12:10 p.m.	5 Minute Deal Flow Talk Hasan Zakaria - Sugar Land Petroleum, Inc.
12:10 p.m. - 12:25 p.m.	10 Strategies that Built a Billion Dollar Balance Sheet Ken Neumann - Youtopia
12:25 p.m. - 1:10 p.m.	Lunch Networking Session
1:10 p.m. - 2:15 p.m.	Family Office Formula Checklist: The 30 Mental Models + Actions Most Common Among Ultra-Wealthy Business Builders
2:15 p.m. - 2:30 p.m.	My Centimillionaire Formula - 10 Unique Strategies & Mental Models You have Never Heard + 5 Mistakes Everyone Makes When Approaching Centimillionaires & Scaling Platforms Peter Von Der Ahe - MFP Capital
2:30 p.m. - 3:00 p.m.	Family Office Formula Cohesion + Adoption: Fundamentals Combined + Worksheet Session + Breakout Groups + Networking
3:00 p.m. - 3:30 p.m.	Open Discussion + Q&A + Top Insights From the Day + 1 Pager Completed to Summarize Your Formula
3:30 p.m. - 4:00 p.m.	Peer-to-Peer Founder & Investor Networking