



# The Family Office Formula

FamilyOffices.com

**AGENDA**

**November 5th, 2025**  
Fort Lauderdale, FL

<b>TIME</b>	<b>TOPIC</b>
10:00 a.m. - 10:10 a.m.	Welcome Address from BDO
10:10 a.m. - 10:30 a.m.	<b>Family Office Formula: Overview, What Disrupts the Formula, What Not to Do</b>
10:30 a.m. - 10:50 a.m.	Single Family Office Fireside Chat: Negotiating Deals, Building a Portfolio of Investments, Scaling Businesses, and Joint Venture Strategy Case Studies   <b>Dr. Alexandra Cook - Sunburst Ventures &amp; Richard C. Wilson - Family Office Club</b>
10:50 a.m. - 11:30 a.m.	<b>Family Office Formula Fundamentals: What are the 7 building blocks at the core of wealth creation?</b>
11:30 a.m. - 12:00 p.m.	Breakout Session + Worksheet Completion + Networking
12:00 p.m. - 12:15 p.m.	The Top 10 Uncommon Things Which Drove Our \$7 Billion in Deals Closed - Strategies, Structures, and Investor Relations Process Insights   <b>Chip Perkins - Perkins Fund Marketing LLC</b>
12:15 p.m. - 12:30 p.m.	Single Family Office Success Formula - 15 Proven but Uncommon Negotiation, Scaling, Structuring, and Time Management Strategies   <b>Cliff Oberlin - Oberlin Wealth Partners</b>
12:30 p.m. - 1:15 p.m.	Lunch Networking Session
1:15 p.m. - 2:15 p.m.	<b>Family Office Formula Checklist: The 30 Mental Models + Actions Most Common Among Ultra-Wealthy Business Builders</b>
2:15 p.m. - 2:30 p.m.	Climbing the Second Mountain: Mindsets for Finding your Life Purpose Post Success   <b>Sylvia Solit - Prime Quadrant</b>
2:30 p.m. - 3:00 p.m.	<b>Family Office Formula Cohesion + Adoption: Fundamentals Combined + Worksheet Session + Breakout Groups + Networking</b>
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