



The Family Office Formula

FamilyOffices.com

AGENDA

November 3rd, 2025
Los Angeles, CA

TIME	TOPIC
10:00 a.m. - 10:05 a.m.	Welcome Address from RSM
10:05 a.m. - 10:25 a.m.	Family Office Formula: Overview, What Disrupts the Formula, What Not to Do
10:25 a.m. - 10:45 a.m.	Joint Venture, Partnership & Investment Pitch Strategies to Close Deals with Celebrities, Centimillionaires, and Pro Athletes Metta World Peace - Artest Management Group & Richard C. Wilson - Family Office Club
10:45 a.m. - 11:20 a.m.	Family Office Formula Fundamentals: What are the 7 building blocks at the core of wealth creation?
11:20 a.m. - 11:50 a.m.	Breakout Session + Worksheet Completion + Networking
11:50 a.m. - 12:00 p.m.	Family Office Strategies to Build Generational Wealth: From Philanthropic Impact to Deal-Making Excellence Kip Kolson - Family Wealth Leadership
12:00 p.m. - 12:15 p.m.	10 Strategies that Built a Billion Dollar Balance Sheet Ken Neumann - Youtopia
12:15 p.m. - 1:00 p.m.	Lunch Networking Session
1:00 p.m. - 1:10 p.m.	Ultra-Wealthy Families Leverage Their Most Important Assets to Create Multigenerational Wealth Kevin Kolson - Family Wealth Leadership
1:10 p.m. - 2:00 p.m.	Family Office Formula Checklist: The 30 Mental Models + Actions Most Common Among Ultra-Wealthy Business Builders
2:00 p.m. - 2:15 p.m.	Strategies to Create & Protect 7 Figures of Cash Flow Bryan Miller - Private Investor
2:15 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