



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.	Maximizing the Power of Proximity at the Super Summit	Richard C. Wilson - Family Office Club
10:05 a.m. - 10:20 a.m.	Investing in an Alternative Asset Combining Fine Art with Precious Metals	Michael Sheppard - Treasure Investments
10:20 a.m. - 10:30 a.m.	Billionaire Fireside Chat: Grant Cardone on Mental Models to Scale, Invest + Increase Your Velocity	Grant Cardone - CardoneCapital.com 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.	Why Flex Space & Self Storage Are the Top Wealth Preservation Plays 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 L. - RE Investor Paul G. - Angel Investor LaVonne I. - Private Investor Ghalib K. - Wealth Manager Joel N. - SFO Hugh D. Cohen, CCIM, SIOR - Cohen Investment Group, LLC



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TIME	TOPIC	SPEAKER
11:50 a.m. - 11:55 a.m.	Empowering Patients to Treat Chronic CNS Disorders – Opioid Addiction, Pain, Epilepsy, etc.	Trevor Castor - Aphios Pharma LLC
11:55 a.m. - 12:00 p.m.	The Pinnacle of Sustainable Recycling, Transforming Waste into Carbon-Free Electricity, Clean Water and Renewable Fuels	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	Moderator Dr. Alexandra C. - SFO Jody C. - SFO Cliff O. - SFO Irwin B. - SFO Tom B. - MFO Shirley H. - FO Advisor
12:35 p.m. - 12:40 p.m.	From Crisis to Catalyst: Turning the Addiction Epidemic into Impactful Investment	Mike Nelson - 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 N. - SFO Hubert Z. - Angel Investor Ron T. - Angel Investor James N. - Private Investor Marc S. - SFO Robert Kinsella - Kinsella Group
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	Moderator Josh M. - RE Investor Ana Sepúlveda del Villar - Apex Forge Capital LLC Philippe Ziade - Otonomus Hotel Zach Avi - MDS Energy Development Jared Graham - Kastelo Development Mike Hagan - Snaxsational Brands Jeff Parker - Katmai Tech Inc.
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 - Zhitta Genesis Medicine Inc.



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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 W. - 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
4:30 p.m. - 4:35 p.m.	HCN: The AI Unicorn About To Change The Way We Travel	Kevin Bidner - Hotel Communication Network
4:35 p.m. - 4:40 p.m.	Protecting and Growing Your Wealth: How to Increase Stock Market Returns While Reducing Market Risk	Tim Smith - Structured Portfolios
4:40 p.m. - 5:15 p.m.	Panel 6 AI Reality Check - Where Artificial Intelligence Technology, Commercialization and Investments are Heading	Moderator Richard C. Wilson - Family Office Club Kyle E. - Angel Investor Simon L. - Private Investor Shane N. - SFO James B. - Private Investor Badri M. - Tech Platform Founder Eric Solis - MovoCash, Inc.
5:15 p.m. - 5:30 p.m.	40 Ready-to-Use Artificial Intelligence Tools [Overview Tour + Stats on Top 10 Most Popular Use Cases]	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.	Decamillionaire Accelerator: How to Scale Your Business + Wealth [Strategies + Checklist Actions for 2026]	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: 15 Strategies to Build a Strategic Multi-Country Single Family Office	Joel Nagel - Nagel & Associates Richard C. Wilson - Family Office Club



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Day 2 | Wednesday, December 10th

TIME	TOPIC	SPEAKER
10:55 a.m. - 11:00 a.m.	Solving the Housing Crisis by Acquiring and Renovating Bank Foreclosed Homes	Charles Cefalu - Ameristar Capital Income Fund
11:00 a.m. - 11:05 a.m.	5 Minute Deal Flow Talk	Philippe Ziade - Otonomus Hotel
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 Todd Heiner - Ridgeline Capital Group Carl F. - Investor Club Head Alex K. - SFO Andrew E. - SFO Randy A. - SFO Yahya M. - SFO
11:40 a.m. - 11:55 a.m.	Beyond Money: Protecting the Legacy You're Building for Tomorrow	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 W. - Investor Club Head Noah R. - MFO Sahil N. - SFO Brad Sumrok - Sumrok Multifamily
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.	MallShark: How AI and Crypto Are Rebuilding Online Commerce	Brandon Jones and Kevin Fugate - MallShark
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 P. - Pro Athlete Investor Brent W. - Pro Athlete Investor Malcolm L. - Pro Athlete Investor Ty M. - Pro Athlete Investor Mike O. - Pro Athlete Investor Rennie C. - Pro Athlete Investor Frank M. - Pro Athlete Investor
2:25 p.m. - 2:30 p.m.	Selling a Dream... Filling a Need How Jaman Properties is Meeting Demand for Luxury Homes after the Palisades Fire	Michael Manheim & Janus Cercone - Jaman Properties
2:30 p.m. - 2:35 p.m.	Arm Investments: Growing Wealth, Arm in Arm	Hasan Zakaria and Ramzi Nassar - Arm Investments
2:35 p.m. - 2:40 p.m.	Surgical Intelligence: Building the Next Multi-Generational MedTech Platform	Saif Khalil - Aevumed



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Day 2 | Wednesday, December 10th

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2:40 p.m. - 2:55 p.m.	Standalone Presentation or 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 Charles Wilson - Family Office Club Guillermo Juarez - HomelInherit Kenneth Hurley - Genius Ventures, Inc. Josh McCallen - VIVÂMEE Hospitality
3:30 p.m. - 3:35 p.m.	Oil Brief: Global Dynamics	Rey Trevino - Pecos Valley Partners
3:35 p.m. - 3:40 p.m.	Exclusive Access to a Premium Off-Market Land Deal	Romain Daniellou - Landquaire Management
3:40 p.m. - 4:15 p.m.	Panel 11 Real Estate LPs & Allocators - A Discussion of Investor Mandates, AI, Deal Structures	Moderator Joe W. - RE Investor JD S. - SFO John L. - RE Investor Dan G. - MFO Peter V. - MFO Gene G. - RE Investor & Tax Strategist Karl Francetic - Realty Investor Capital
4:15 p.m. - 4:30 p.m.	Advanced Deal Structure Strategies - How to Create a Top 1 % Structure	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.	Platform Plays - Growing by Moving from Complexity to Clarity	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.	Feeding Nations, Building Legacy: Impact Investing Through Kingdom Infrastructure	David Lapp - Blessings of Hope
10:40 a.m. - 10:45 a.m.	A Pediatrician's Perspective: 3 Practical Strategies to Engage Next Gen Heirs and Reduce Wealth Transfer Risk	Dr. Jasmine Zapata, MD, MPH



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Day 3 | Investor Day | Thursday, December 11th

TIME	TOPIC	SPEAKER
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 Randy R. - Private Investor David S. - MFO Marija E. - MFO Dr. Jeffrey Hockings - Diabetes Reversal Group
11:20 a.m. - 11:25 a.m.	ColdSnap - Freeze Ice Cream on Demand!	Matt Fonte - ColdSnap
11:25 a.m. - 11:30 a.m.	De-Risked Gas Development. Immediate Tax Benefits. Scalable Upside.	Joe McClinton - iLEX Energy Corporation
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 - Family Office Club William N. - Private Investor Anna S. - SFO Kyle E. - Angel 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 Noah R. - MFO Jonathan B. - MFO Molly G. - MFO Brett R. - MFO Ronald B. - Wealth Manager Joe N. - SFO
1:55 p.m. - 2:10 p.m.	5 Secrets to Help You Think Like a Navy SEAL	William Branum - Retired Navy SEAL, Best Selling Author, Strategic Advisor, Founder of 5 SEAL Secrets & Naked Warrior Recovery
2:10 p.m. - 2:15 p.m.	Minnesota Hockey Hall of Fame-A Unique Private Real Estate Offering By Consumer Science North	Chris Winkler - Consumer Science North
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 B. - Investor Club Head James K. - Private Investor Nazar N. - SFO Andre F. - Pro Athlete Investor
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 - Family Office Club Candice B. - SFO Marc H. - Investor Club Head Brian W. - Wealth Advisor Dan G. - MFO Giorgi A. - SFO
3:20 p.m. - 3:35 p.m.	Super Summit Summary - Top 30 Quotes + Notes Over 3 Days	Richard C. Wilson - Family Office Club
3:35 p.m. - 4:35p.m.	Networking Reception	