

March 4th - 5th, 2026 All Times are PST



Beverly Hills Investor Summit

AGENDA

Day 1 | Wednesday March 4th

TIME	TOPIC
8:30 a.m.	Registration Open and AI Supported Speed Networking
10:00 a.m. - 10:15 a.m.	Maximize Your ROI Today, Member Portal Update + Investor Pipeline Builder 2.0 is Live Richard C. Wilson - Family Office Club
10:15 a.m. - 10:20 a.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
10:20 a.m. - 10:25 a.m.	Why Flex Space & Self Storage Are the Top Wealth Preservation Plays of the Decade James Reid - Investa Capital
10:25 a.m. - 10:45 a.m.	Centimillionaire Fireside Chat: 12 Unusual Strategies I Used to Scale to \$1 Billion in Revenue Tim Cohen - Eggs Unlimited & Richard C. Wilson - Family Office Club
10:45 a.m. - 11:00 a.m.	Beyond Money: Protecting the Legacy You're Building for Tomorrow Vincent Munno - Simplicity UFC
11:00 a.m. - 11:05 a.m.	Scaling an Institutional Platform to \$100M+ in Revenue Trevor Sperry - Olympus Pines
11:05 a.m. - 11:40 a.m.	Panel 1 \$1 Billion+ Platforms & Partners - Securing Transformational Partners
11:40 a.m. - 11:55 a.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
11:55 a.m. - 12:00 p.m.	How to Double Your Equity through Land Entitlement Kevin Lanson - Landquire
12:00 p.m. - 12:05 p.m.	Energy & Sustainability: Growth Markets Redefining the Future Sam Meyer - Craft
12:05 p.m. - 12:25 p.m.	Decamillionaire Fireside Chat: Due Diligence Tools, Strategies and Case Studies Marc Halpern - Deep Due Diligence Investors & Richard C. Wilson - Family Office Club
12:25 p.m. - 12:35 p.m.	Morning Summary and AI Tool Demo Richard C. Wilson - Family Office Club
12:35 p.m. - 2:00 p.m.	Lunch Sponsored by SingleFile
2:00 p.m. - 2:35 p.m.	Panel 2 Private Investor Mandates - Preferences and Strategies of Ultra-Wealthy Private Investors
2:35 p.m. - 2:40 p.m.	Wealth Preservation Reimagined: Family Office Strategies for the Next Generation Sylvester Morgan - FuzeBox AI
2:40 p.m. - 2:45 p.m.	Secondaries & Liquidity: Unlocking Value in Private Markets Gary Melman - Beyond International Group
2:45 p.m. - 3:05 p.m.	Decamillionaire Fireside Chat: How We Built our Steel Company up to 8 Figures in Revenue over 20+ Years Nathan McWhirter & David McWhirter - McWHIRTER STEEL & Richard C. Wilson - Family Office Club
3:05 p.m. - 3:40 p.m.	Panel 3 Niche Investment Strategy Showcase
3:40 p.m. - 3:45 p.m.	Venture Capital Evolution
3:45 p.m. - 3:50 p.m.	Emerging Market Debt & Currency Plays
3:50 p.m. - 4:25 p.m.	Panel 4 How to Work With Investor Clubs, RIAs + Wealth Advisors for Exponential Growth



March 4th - 5th, 2026 All Times are PST



Beverly Hills Investor Summit

AGENDA

Day 1 | Wednesday March 4th

TIME	TOPIC
4:25 p.m. - 4:30 p.m.	Global Markets: Emerging Economies Driving the Next Wave of Growth Rey 'R.T.' Trevino III - Pecos Valley Partners
4:30 p.m. - 4:35 p.m.	Next Agricultural Revolution
4:35 p.m. - 5:10 p.m.	Panel 5 Investment Trends - Artificial Intelligence, Technology, Robotics, Blockchain, Art and More
5:10 p.m. - 5:25 p.m.	Improving Due Diligence, Building Your Platform, Structuring Transactions, + Saving 100 Hours a Month with Artificial Intelligence Richard C. Wilson - Family Office Club
5:25 p.m. - 6:25 p.m.	Networking Reception

Day 2 | Investor Day | Thursday March 5th

TIME	TOPIC
9:00 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. - 10:40 a.m.	Centimillionaire Fireside Chat: How to Secure Multiple \$1B Allocations, How to Be Institutional Quality & Win at the Highest Levels Marcus Ridgway - F6 Partners & Richard C. Wilson - Family Office Club
10:40 a.m. - 10:45 a.m.	Preparing Family Enterprises for the Future Paul Russo - K2X Technology & Life Science
10:45 a.m. - 10:50 a.m.	AI-Driven Trading: Anticipating Markets in Real Time
10:50 a.m. - 11:25 a.m.	Panel 6 Centimillionaire Secret Sauce
11:25 a.m. - 11:30 a.m.	The Ultra-Wealthy Playbook: What They Do Differently
11:30 a.m. - 11:35 a.m.	Recession-Proof Portfolios: Positioning for What's Next
11:35 a.m. - 12:10 p.m.	Panel 7 Allocator Instant Opportunity Feedback Panel - First Impressions from Investors on One-Pagers, One Minute Videos and One Liners
12:10 p.m. - 1:25 p.m.	Lunch
1:25 p.m. - 2:00 p.m.	Panel 8 Pro Athlete Investors - Hear from NFL, NBA + Others on Being a Top .1% Performer, Founder + Investor
2:00 p.m. - 2:20 p.m.	Centimillionaire Fireside Chat: Scaling Rapidly + Navigating Exits With Strategic Buyers Danny Mikhail - Melka Capital & Richard C. Wilson - Family Office Club



March 4th - 5th, 2026 All Times are PST



Beverly Hills Investor Summit

AGENDA

Day 2 | Investor Day | Thursday March 5th

TIME	TOPIC
2:20 p.m. - 2:25 p.m.	Empowering Patients to Treat Chronic CNS Disorders – Opioid Addiction, Pain, Epilepsy, etc.
2:25 p.m. - 3:00 p.m.	Panel 9 Early Stage Investing & Seed Capital
3:00 p.m. - 3:35 p.m.	Panel 10 Family Office Focus - Deal Requests, Opportunity Flow, Structure Preferences + Strategies in Demand
3:35 p.m. - 3:50 p.m.	Closing Remarks Richard C. Wilson - Family Office Club
3:50 p.m. - 4:50 p.m.	Networking Reception

