



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-Luxury Homes is Meeting Demand after the Pacific 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.	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.	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.	Craft – Private Aviation Purpose-Built for Modern Wealth Israel Slodowitz - 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.	5 Strategies Decamillionaires Use to Scale Platforms 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.	What Google and IBM Taught Me About Scaling AI – and Why FuzeBox Is the Next Chapter Sylvester Morgan - FuzeBox AI
2:40 p.m. - 2:45 p.m.	Beyond International Group Introduction 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 & Angela 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.	Deal Flow Talk
3:45 p.m. - 3:50 p.m.	Deal Flow Talk
3:50 p.m. - 4:25 p.m.	Panel 4 How to Work With Investor Clubs, RIAs + Wealth Advisors for Exponential Growth

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4:25 p.m. - 4:30 p.m.	Oil Price Brief: Global Dynamics At Play Rey 'R.T.' Trevino III - Pecos Valley Partners
4:30 p.m. - 4:35 p.m.	Deal Flow Talk
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.	Top 5 Strategic Investor Conversations in 2026 + 3 AI Developments to Watch 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.	A Liquid Way to Invest in Startups Paul Russo - K2X Capital
10:45 a.m. - 10:50 a.m.	Why Real Estate Investing? And How to Make it Simple? Dan Brisse - Granite Towers Equity Group
10:50 a.m. - 11:25 a.m.	Panel 6 Centimillionaire Secret Sauce
11:25 a.m. - 11:30 a.m.	Humanoid Robotics: The Future of Labor Jacob Phillips - Whisper Lane Capital
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



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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.	Top 20 Event Insights, New Investor Club Resources, and Changes Coming Soon Richard C. Wilson - Family Office Club
3:50 p.m. - 4:50 p.m.	Networking Reception