



# Investor Accelerator Events

Speed Networking + Investor Talks



Venue Partner:



April 23<sup>rd</sup> | Dallas, TX

## AGENDA

TIME	TOPIC
10:00 a.m. - 10:30 a.m.	7 Ways to use Claude Skills + Co Work to Save 100 Hours/Year   <b>Richard C. Wilson - Family Office Club</b>
10:30 a.m. - 10:40 a.m.	Back-Office Solutions for the Modern Family Office   <b>Brandon McMahon - RSM</b>
10:40 a.m. - 10:50 a.m.	Scaling with Strategy: Building a Vertically Integrated Ecosystem   <b>Garen Armstrong - Shamrock Roofing</b>
10:50 a.m. - 11:00 a.m.	Top 5 Strategies Helping Scale Our Platform: Sourcing, Positioning, Structuring Insights   <b>James Reid - Investa Capital</b>
11:00 a.m. - 11:30 a.m.	Speed Networking Round I
11:30 a.m. - 11:40 a.m.	We Couldn't Find Anyone Daring Enough, So We Built It Ourselves   <b>Chris Parker - CGT Capital Group</b>
11:40 a.m. - 12:30 p.m.	Deal Structuring Masterclass: 10 Terms That Make or Break a Deal - Investment Structure Strategies Overview   <b>Richard C. Wilson - Family Office Club</b>
12:30 p.m. - 1:30 p.m.	Lunch
1:30 p.m. - 1:40 p.m.	Investing and Conducting Due Dilligence   <b>Kristina Roth - Founder, SuperShe Island and SMASHD</b>
1:40 p.m. - 1:50 p.m.	3 Non-Obvious Strategies to Source Distressed Off-Market Deals + What Matters Most While Vetting Deals Right Now   <b>Omar Khan - Boardwalk Wealth</b>
1:50 p.m. - 2:20 p.m.	Speed Networking Round II
2:20 p.m. - 3:00 p.m.	How to Build a Family Office Rolodex From Zero to 100 in 18 Months   <b>Richard C. Wilson - Family Office Club</b>
3:00 p.m. - 4:00 p.m.	Family Office Chessboard: Strategic Partnerships, Multi-Dimensional Assets, Leverage + Crafting Niche Monopoly Positions   <b>Richard C. Wilson - Family Office Club</b>
4:00 p.m. - 4:30 p.m.	Speed Networking Round III