



Investor Accelerator Events

Speed Networking + Investor Talks

Venue Partner:

RSM

AGENDA

April 22nd | New York City, NY

TIME	TOPIC
10:00 a.m. - 10:05 a.m.	Welcome from RSM Nick Louros
10:05 a.m. - 10:30 a.m.	7 Ways to use Claude Skills + Co Work to Save 100 Hours/Year Richard C. Wilson - Family Office Club
10:30 a.m. - 10:40 a.m.	Unlocking Institutional Capital: The Role and Strategic Growth Playbook of Placement Agents Chip Perkins - Perkins Fund Marketing LLC
10:40 a.m. - 10:50 a.m.	The Power of the Pivot Lisa Morris - AKS Family Partners LP/AKS Family Foundation
10:50 a.m. - 11:00 a.m.	Growing Platforms, Structuring Deals, and Raising Capital John Lettera - Fairbridge Asset Management
11:00 a.m. - 11:30 a.m.	Speed Networking Round I
11:30 a.m. - 11:40 a.m.	Due Diligence Strategies Suzanne Murphy - SEM Investments
11:40 a.m. - 11:50 a.m.	Building Durable Growth in Underbuilt Markets Jeremiah White - White Sport Ventures
11:50 a.m. - 12:30 p.m.	Deal Structuring Masterclass: 10 Terms That Make or Break a Deal - Investment Structure Strategies Overview Richard C. Wilson - Family Office Club
12:30 p.m. - 1:00 p.m.	Lunch
1:00 p.m. - 1:10 p.m.	10 Small Details That Are a Big Deal in Due Diligence Marc Halpern - Deep Due Diligence Investors
1:10 p.m. - 1:20 p.m.	Data Center Investing & Strategies for Conducting Due Diligence Prior to Allocating Capital Kamil Homsy - GRC Investment Group - Dubai (sfo)
1:20 p.m. - 1:30 p.m.	Guest Speaker Presentation Nazar "Nick" Nazarov - Intrepid Equity Management LLC
1:30 p.m. - 2:00 p.m.	Speed Networking Round II
2:00 p.m. - 2:30 p.m.	How to Build a Family Office Rolodex From Zero to 100 in 18 Months Richard C. Wilson - Family Office Club
2:30 p.m. - 2:40 p.m.	The Second Best Way To Get Rich In America: Paying Less In Taxes Peter Culver - Wealthrive
2:40 p.m. - 2:50 p.m.	What Baseball Taught Me About Reinvention Mike O' Connor - Gallagher
2:50 p.m. - 3:00 p.m.	Guest Speaker Presentation Angela Lee - 37 Angels
3:00 p.m. - 3:30 p.m.	Family Office Chessboard: Strategic Partnerships, Multi-Dimensional Assets, Leverage + Crafting Niche Monopoly Positions Richard C. Wilson - Family Office Club
3:30 p.m. - 4:00 p.m.	The 10 Red Flags That Kill Deals With Family Offices Richard C. Wilson - Family Office Club
4:00 p.m. - 4:30 p.m.	Speed Networking Round III