



Single Family Office Summit

May 28th - 29th, 2026 All Times are PST

AGENDA

Day 1 | Thursday May 28th

TIME	TOPIC
8:30 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. - 10:35 a.m.	Protecting the Legacy You're Building for Tomorrow Vincent Munno - Simplicity UFC
10:35 a.m. - 10:55 a.m.	Single Family Office Focus: How I Built a Top 3 Platform Working with 100+ \$100M+ Net Worth Families Thomas Handler - Handler Law, LLP & Richard C. Wilson - Family Office Club
10:55 a.m. - 11:00 a.m.	Private Credit & Real Assets: Where Yield Meets Security Jay Cormier - Eyedaptic, Inc.
11:00 a.m. - 11:35 a.m.	Panel 1 Investor Introductions - Exactly What They're Investing In Now
11:35 a.m. - 11:40 a.m.	Family Offices, Funds, and Founders: Where Deals Actually Happen
11:40 a.m. - 11:45 a.m.	Why Flex Space & Self Storage Are the Top Wealth Preservation Plays of the Decade James Reid - Investa Capital
11:45 a.m. - 12:20 p.m.	Panel 2 The Future of the Single Family Office Industry - Where New Family Offices Are Focused + Investing - New Trends & NextGen Insights
12:20 p.m. - 1:30 p.m.	Lunch
1:30 p.m. - 2:05 p.m.	Panel 3 A Discussion on the Top Problems, Time Wasters, and Frustrations of Single Family Offices
2:05 p.m. - 2:10 p.m.	Direct Deals vs. Fund Models: The Future of Private Allocation
2:10 p.m. - 2:15 p.m.	De-Risking in an Era of Global Volatility
2:15 p.m. - 2:35 p.m.	Fireside Chat Chris Lee - Next Level Pros & Richard C. Wilson - Family Office Club
2:35 p.m. - 3:10 p.m.	Panel 4 Investment Opportunities & Strategies - Hear Directly from Founders of Companies, Platforms & Funds
3:10 p.m. - 3:15 p.m.	Family Office Deal Syndication: Lessons from \$100M+ Co-Investors
3:15 p.m. - 3:20 p.m.	The Dollar, the Fed, and the Future: 3 Scenarios Investors Must Prepare For
3:20 p.m. - 3:55 p.m.	Panel 5 Pro Athlete Investors - Hear from NFL, NBA + Others on Being a Top .1% Performer, Founder + Investor
3:55 p.m. - 4:00 p.m.	Inflation, AI, and Aging Populations: The Tri-Forces Shaping Investment
4:00 p.m. - 4:05 p.m.	The Deep Tech Playbook: Where Only Smart Capital Survives
4:05 p.m. - 4:40 p.m.	Panel 6 \$100M & \$1B+ Single Family Office Investor Mandates & Strategies
4:40 p.m. - 4:55 p.m.	Closing Remarks Richard C. Wilson - Family Office Club
4:55 p.m. - 5:55 p.m.	Networking Reception



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AGENDA

Day 2 | Investor Day | Friday May 29th

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.	Fireside Chat
10:40 a.m. - 10:45 a.m.	From Crisis to Cash Flow: Investing in 'Distressed with Upside'
10:45 a.m. - 10:50 a.m.	Outlier Assets: Niche Opportunities the Institutions Are Ignoring
10:50 a.m. - 11:25 a.m.	Panel 7 Investor Connections - Investor Clubs, Multi-Family Offices and Custodians
11:25 a.m. - 11:30 a.m.	The Contrarian's Edge: How to Go Against the Herd and Win
11:30 a.m. - 11:35 a.m.	The Sustainability Stack: Assets Built for the Next 50 Years
11:35 a.m. - 12:10 p.m.	Panel 8 Real Estate Investments - Constructing, Balancing & Adjusting Your Portfolio
12:10 p.m. - 1:25 p.m.	Lunch
1:25 p.m. - 2:00 p.m.	Panel 9 Live Investor Ratings
2:00 p.m. - 2:20 p.m.	Strategy Session
2:20 p.m. - 2:25 p.m.	Legacy Capital: Building Portfolios That Outlive You
2:25 p.m. - 3:00 p.m.	Panel 10 Private Investor Focus - Learn What is the #1 Most Important Investment Attribute, Strategy, or Industry for Active Investors
3:00 p.m. - 3:35 p.m.	Panel 11 Technology, Artificial Intelligence & Blockchain Investment Strategies - Trends & Forecasts of What is Coming Next
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