

# The \$100M Summit

FamilyOffices.com/100M

July 16<sup>th</sup>, 2026  
Dallas, TX All Times are CT

## AGENDA

TIME	TOPIC
8:00 a.m.	Registration Open
10:00 a.m. - 10:15 a.m.	10 Proven Strategies to Scale to \$100M based on 1,500 Talks on Stage at our 300 Events over 19 years   Richard C. Wilson - Family Office Club
10:15 a.m. - 10:20 a.m.	Mid Year Oil Brief: Who's Driving the Oil Train?   Rey 'R.T.' Trevino - Pecos Valley Partners (Manages \$1B+ Real Asset Platform)
10:20 a.m. - 10:30 a.m.	Presentation by Kevin Harrington (Original Investor Shark on "Shark Tank" and Founder of "As Seen on TV")
10:30 a.m. - 10:40 a.m.	Presentation by Jeff Shada - Valuation Pro, Inc (Serial Entrepreneur Advisor)
10:40 a.m. - 10:50 a.m.	The Capital Stack Is the Business: How Structuring for Capital Unlocks Scale   Yahya Mahmoud - BNQ Group (Centimillionaire/Single Family Office)
10:50 a.m. - 11:00 a.m.	Protecting the Legacy You're Building for Tomorrow   Vince Munno - Simplicity UFC (35+ yr. Advanced Wealth Planning Strategist)
11:00 a.m. - 11:05 a.m.	Presentation by David Munson - FOI Group, LLC (Impact Invention Investor)
11:05 a.m. - 11:15 a.m.	Standalone Presentation
11:15 a.m. - 11:30 a.m.	Presentation by John Lettera - Fairbridge Asset Management (Centimillionaire Founder of \$800M Platform)
11:30 a.m. - 11:40 a.m.	The Future of Private Credit   Cole Reifler - Zenith Group Advisors (Founder, Private Credit Platform)
11:40 a.m. - 11:50 a.m.	How Success along with Challenges Paved the Way to \$100M+ in Capital Raised   George Pace - Epic Capital Funds (Director of Investor Relations - \$100M+ Raised)
11:50 a.m. - 12:00 p.m.	Presentation by Neal Inscoc - The Family Office Foundry (\$250M+ Family Office Operator)
12:00 p.m. - 12:10 p.m.	Standalone Presentation
12:10 p.m. - 12:20 p.m.	Presentation by Garen Armstong - Shamrock Roofing & Construction (Centimillionaire Founder - \$70M in Revenue)
12:20 p.m. - 1:50 p.m.	Lunch
1:50 p.m. - 2:00 p.m.	Presentation by Randy Abeles - RPR (Manages \$1B Single Family Office)
2:00 p.m. - 2:05 p.m.	Presentation by Tim Herriage - Ternus (\$3B in RE Deals Over 20 Years)
2:05 p.m. - 2:15 p.m.	Presentation by Hemanth Golla - High Circle Ventures (Investor Group Founder & SPV-Powered Unicorn Investor)
2:15 p.m. - 2:30 p.m.	Standalone Presentation
2:30 p.m. - 2:35 p.m.	Strategies for Scaling our Real Estate Platform   James Reid - Investa Capital (Founder - Vertically Integrated Flex Space \$2.5M Platform)
2:35 p.m. - 2:45 p.m.	Capital Follows Certainty   Irwin Boris, Heritage Capital Group (SFO - \$5B in RE Transactions)
2:45 p.m. - 2:55 p.m.	Presentation by Sahil Nandwani - Calafia Group (Centimillionaire NextGen Family Office)
2:55 p.m. - 3:00 p.m.	Deal Flow Talk
3:00 p.m. - 3:15 p.m.	Standalone Presentation
3:15 p.m. - 3:20 p.m.	Presentation by Karl Pierre - Aaidebook Holdings (25 yr. Home Health Operator)
3:20 p.m. - 3:30 p.m.	3 Strategies on Growing to \$10M in Revenue/\$100M in AUM + 3 Strategies Scaling to \$1 Billion+ in AUM   Marcus Ridgway - F6 Partners (\$5B+ Raised & IPO Exit Founder)
3:30 p.m. - 3:45 p.m.	Overview of the \$100M Summit: Most Common Points, Trends, Unique Strategies & Powerful Insights   Richard C. Wilson - Family Office Club
3:45 p.m. - 4:45 p.m.	Networking Reception