



Capital Raising Bootcamps

FamilyOffices.com/Bootcamp

August 17th | Fort Lauderdale, FL

August 18th | New York City, NY **Virtual**

August 19th | Dallas, TX

August 20th | Los Angeles, CA

AGENDA

TIME	TOPIC
9:30 a.m.	Registration and Networking
10:00 a.m. - 10:20 a.m.	Top 5 reframes to think differently about investors, Top 5 mistakes everyone makes while raising capital, and 3 artificial intelligence tools to help that are included in your membership
10:20 a.m. - 10:30 a.m.	Positioning Power: How to attract capital vs. chase it, what draws investors in, recent case study of our member who struggled to raise \$5M, changed positions, and has raised \$55M since
10:30 a.m. - 10:45 a.m.	Capital Raising Materials Checklist: Audit what you have, what you may need next and create a top 3 action item plan to level-up your communications with investors
10:45 a.m. - 11:00 a.m.	Family Office Deal Case Studies: How to Close More \$500k, \$1M, \$5M and \$10M+ Checks from Centimillionaires & Up
11:00 a.m. - 11:15 a.m.	Presentation by Natalia Sokolova - SGG World Verda SFO [Ultra Wealthy Investor - SFO]
11:15 a.m. - 11:45 a.m.	After 1,000 hours studying influence and persuasion, and 19 years running our investor club; Here are the 5 most important investor relations & capital raising insights that work
11:45 a.m. - 12:00 p.m.	Custom Deal Structure Success: 5 examples of restructuring deals to close investors who said no, and 1 artificial intelligence tool that is a game changer to make you 10x faster and more creative in structuring your next raise
12:00 p.m. - 12:30 p.m.	Crystal Clear Advantage: Reversing the Flow of Investor Demand, Power Brokers, and Joint Ventures
12:30 p.m. - 1:00 p.m.	Networking Lunch
1:00 p.m. - 1:15 p.m.	5 Insights on Doing Business with Family Offices, Decamillionaire & Centimillionaires + 3 Strategies That Are Counter-Intuitive Neal Inscoe - The Family Office Foundry [CEO of a Multi-Family Office with Decamillionaire & Centimillionaire Clients]
1:15 p.m. - 1:30 p.m.	The #1 strategy to attract investors: the holy grail of capital raising as one \$1B+ capital raiser put it
1:30 p.m. - 1:45 p.m.	DD Advantage: 4 things nobody does that every every investor will appreciate when deciding whether to invest with you
1:45 p.m. - 2:00 p.m.	Our investor club's tech stack to move faster: investor pipeline builder, investor club navigator, family office finder, and copilot tools
2:00 p.m. - 2:15 p.m.	3 Super Powers to Raise More Capital, How to Close 16x More Often and What Nobody Wants To Do But Works
2:15 p.m. - 2:30 p.m.	1 out of 1,000 Opportunities: Ways to Add Value First, & Choke Points [AI Tool Available Free with membership]
2:30 p.m. - 3:00 p.m.	Implementation Worksheet: Top 3 and top 10 action items and changes in strategy to act on after the workshop
3:00 p.m. - 3:15 p.m.	Social Media, Advertising, Top Channels & \$1M Mistakes
3:15 p.m. - 4:00 p.m.	Round Table Discussion: Top Insights & New Strategies From The Day

