



# SUPER SUMMIT 2023 AGENDA

December 5<sup>th</sup> - 7<sup>th</sup>, 2023 | All Times are EST

## Day 1 | Monday December 4<sup>th</sup>

TIME	TOPIC
4:00 p.m. - 6:00 p.m.	Registration
4:00 p.m. - 6:00 p.m.	Welcome Reception

## Day 2 | Tuesday December 5<sup>th</sup>

TIME	TOPIC	SPEAKER
9:00 a.m.	Registration Opens	
10:00 a.m. - 10:20 a.m.	Opening Remarks	<b>Richard C. Wilson</b> - Family Office Club
10:20 a.m. - 10:35 a.m.	Standalone Presentation	<b>Max S.</b>
10:35 a.m. - 10:50 a.m.	Standalone Presentation	<b>Ken N.</b>
10:50 a.m. - 11:05 a.m.	Standalone Presentation	<b>Jason M.</b>
11:05 a.m. - 11:40 a.m.	<b>Panel 1   Investor Introductions</b> - Hear from Investors on Exactly What They're Investing In Now	<b>Moderator   Charles Wilson</b> - Family Office Club Benjamin M. Keith B. Todd R. David D. Tengjun W. Ken G.
11:40 a.m. - 11:55 a.m.	Standalone Presentation	<b>Sylvia B.</b>
11:55 a.m. - 12:10 p.m.	The Future of the Family Office Using Tech to Up the Game	<b>Jay K. &amp; Ann O.</b>
12:10 p.m. - 12:45 p.m.	<b>Panel 2   Doctor's Investor Club</b> - Doctors & Dentists Share What They're Investing In, How They're Growing Their Practices & Why They're Focused on Healthcare Deals	<b>Moderator   Richard C. Wilson</b> - Family Office Club Hubert Z. Eric T. Shane S.
12:45 p.m. - 2:00 p.m.	Lunch	
2:00 p.m. - 2:35 p.m.	<b>Panel 3   Pro Athlete Investors</b> - Active and Retired Pro Athletes on Their Investment Goals and Criteria	<b>Moderator   Andres Ospina</b> - Family Office Club LaVonne I. Garrett K. Tommy M.



# SUPER SUMMIT 2023 AGENDA

December 5<sup>th</sup> - 7<sup>th</sup>, 2023 | All Times are EST

## Day 2 | Tuesday December 5<sup>th</sup>

TIME	TOPIC	SPEAKER
2:35 p.m. - 3:10 p.m.	<b>Panel 4   \$100 Million+ Strategies</b> - 7 Firms Managing Over \$100M of Assets: What Got Them There, What Is Working Now & Where They Are Headed Next	<b>Moderator   Holly Caliendo</b> - Family Office Club
3:10 p.m. - 3:25 p.m.	Standalone Presentation	<b>Vincent M.</b>
3:25 p.m. - 4:00 p.m.	<b>Panel 5   Deal Sourcing Opportunities &amp; Due Diligence in Today's Market</b>	<b>Moderator   Dr. Alexandra C.</b> Anil D. Marc H. Steven S. Ken H. Adam F. Marc S.
4:00 p.m. - 4:20 p.m.	Centimillionaire Fireside Chat with Joel Nagel & Richard C. Wilson	<b>Joel N.</b> <b>Richard C. Wilson</b> - Family Office Club
4:20 p.m. - 4:55 p.m.	<b>Panel 6   Big Brother Partners</b> - \$500M and \$1B+ Firms Discuss How They Partner with Smaller Sponsors & Funds	<b>Moderator   Joe W.</b> Brenton S. Kamil H. Alice C. Richard C. Wilson - Family Office Club
4:55 p.m. - 5:10 p.m.	Closing Remarks	<b>Richard C. Wilson</b> - Family Office Club
5:10 p.m. - 6:10 p.m.	Cocktail Hour	

## Day 3 | Wednesday December 6<sup>th</sup>

TIME	TOPIC	SPEAKER
9:30 a.m.	Registration Opens	
10:00 a.m. - 10:20 a.m.	Opening Remarks	<b>Richard C. Wilson</b> - Family Office Club
10:20 a.m. - 10:35 a.m.	Standalone Presentation	
10:35 a.m. - 10:50 a.m.	Standalone Presentation	



# SUPER SUMMIT 2023 AGENDA

December 5<sup>th</sup> - 7<sup>th</sup>, 2023 | All Times are EST

## Day 3 | Wednesday December 6<sup>th</sup>

TIME	TOPIC	SPEAKER
10:50 a.m. - 11:05 a.m.	Standalone Presentation	Don W.
11:05 a.m. - 11:40 a.m.	<b>Panel 7   Real Estate Joint Ventures</b> - How 6 Panelists & Our \$1B+ AUM Club Structure JV & Co-GP Deals	<b>Moderator   Richard C. Wilson</b> - Family Office Club Alec R. Brian W. Nick N. Irwin B. John H. Joe W.
11:40 a.m. - 11:55 a.m.	Standalone Presentation	
11:55 a.m. - 12:10 p.m.	Standalone Presentation	
12:10 p.m. - 12:45 p.m.	<b>Panel 8   Niche Investment Strategy Showcase</b> - How Investment Firms are Growing Largely Due to Their Unique Offerings in the Marketplace	<b>Moderator   Andres Ospina</b> - Family Office Club Steve S.
12:45 p.m. - 2:00 p.m.	Lunch	
2:00 p.m. - 2:35 p.m.	<b>Panel 9   AI Reality Check</b> - Where Artificial Intelligence Technology, Commercialization and Investments are Heading	<b>Moderator   Charles Wilson</b> - Family Office Club James B. Jonte H. Mike K. Litan Y. Harry K. Simon L. Manoel S.
2:35 p.m. - 2:50 p.m.	Standalone Presentation	
2:50 p.m. - 3:25 p.m.	<b>Panel 10   \$1M Insights</b> - Ultra-Wealthy Investors Share an Insight or Lesson Learned That Can Make or Save \$1 Million	<b>Moderator   Dr. Forrest B.</b> Kristina R. Dr. Jacque S. Dr. Alexandra C. Richard C. Wilson - Family Office Club
3:25 p.m. - 3:40 p.m.	Standalone Presentation	
3:40 p.m. - 3:55 p.m.	Standalone Presentation	
3:55 p.m. - 4:30 p.m.	<b>Panel 11   Investment Trends</b> - Longevity, Cannabis, Psychedelics, AI/Blockchain, Crypto & Sports Betting	<b>Moderator   Daphny Obregon</b> - Family Office Club Sylvia B. Dr. Gregory P. Ole M. Sasha B. Eric T. Clinton B.



# SUPER SUMMIT 2023 AGENDA

December 5<sup>th</sup> - 7<sup>th</sup>, 2023 | All Times are EST

## Day 3 | Wednesday December 6<sup>th</sup>

TIME	TOPIC	SPEAKER
4:30 p.m. - 4:45 p.m.	8 Leadership Lessons from Climbing the Seven Summits	<b>Bo P.</b>
4:45 p.m. - 5:20 p.m.	<b>Panel 12   \$1 Billion+ Family Office Panel - Top Family Office Leaders Managing Billions in Capital Each</b>	<b>Moderator   Pierre D.</b> Nick B. Giorgi A. Adam Q. Ira P. John L.  <b>Richard C. Wilson - Family Office Club</b>
5:20 p.m. - 5:35 p.m.	Closing Remarks	
5:35 p.m. - 6:35 p.m.	Cocktail Hour	

## Day 4 | Thursday December 7<sup>th</sup>

TIME	TOPIC	SPEAKER
9:30 a.m.	Registration Opens	
10:00 a.m. - 10:20 a.m.	Opening Remarks	<b>Richard C. Wilson - Family Office Club</b>
10:20 a.m. - 10:35 a.m.	Standalone Presentation	
10:35 a.m. - 10:50 a.m.	The Ego Mistake: From 8 Figures To \$8.25 Per Hour	<b>Marques O.</b>
10:50 a.m. - 11:25 a.m.	<b>Panel 13   Niche Investors - Private &amp; Angel Investors and Family Offices Focused 80% or More on Specific Verticals</b>	<b>Moderator   Kamil H.</b> Stephanie L. Bethann K. Alex K. Danny M.
11:25 a.m. - 12:00 p.m.	<b>Panel 14   Medical Practice Profits - How Investors, Tech Tools &amp; Platforms are Evolving within the Multi-Location Medical Practice Platform Space</b>	<b>Moderator   Dr. Jacque S.</b> Richard C. Wilson - Family Office Club Trase B.
12:00 p.m. - 12:55 p.m.	Lunch	



# SUPER SUMMIT 2023 AGENDA

December 5<sup>th</sup> - 7<sup>th</sup>, 2023 | All Times are EST

## Day 4 | Thursday December 7<sup>th</sup>

TIME	TOPIC	SPEAKER
12:55 p.m. - 1:30 p.m.	<b>Panel 15   5 Leaders of Investor Clubs Share Insights on How to Work with Them, Groups Like Them &amp; Who Makes it Through Their Screening</b>	<b>Moderator   Keith B.</b> Carl F. Brittany A. Jared S. John B. Dr. Forrest B.
1:30 p.m. - 2:05 p.m.	<b>Panel 16   \$1B+ Multi-Family Offices &amp; RIAs - Hear from Industry Leading RIAs and MFOs</b>	<b>Moderator   Charles Wilson - Family Office Club</b> Paul K. Sachin P. Matt K. Cliff O.
2:05 p.m. - 2:20 p.m.	Closing Remarks	<b>Richard C. Wilson - Family Office Club</b>