

# THE FAMILY OFFICE SUPER SUMMIT



JW Marriott Miami  
December 1<sup>st</sup> – 2<sup>nd</sup>

*Join Hundreds of Family Office Executives, Private  
Wealth Managers, Dealmakers, and Investors for an  
Unparalleled Conference Experience*



# THE FAMILY OFFICE SUPER SUMMIT

## Dear Colleague,

Our focus for this year's events is to promote a collaborative, relationship-building environment where family offices and institutional investors can share insights and resources, partner together on deals, and improve their operations with the help of their peers. Once again, we are hosting our annual Family Office Super Summit in beautiful Miami, Florida - just in time for the Art Basel Miami festival. The Family Office Super Summit is the largest family office conference featuring 60+ speakers, a day dedicated to \$1B+ family offices, dozens of single family offices, and hundreds of delegates.

### WHO WILL BE SPEAKING:

You will hear from more than 60 family offices through a mix of standalone presentations and intriguing panel discussions. If you have been to one of our conferences, you know that we are dedicated to featuring top institutional investors and family offices presenting on the most pressing topics, from allocation strategies to risk management and best practices for guarding wealth.

### WHO WILL BE ATTENDING:

Our conferences attract institutional investors, family office executives, private equity dealmakers, investment fund managers, high-net-worth individuals, and a variety of family office industry participants. As always, family office executives are welcome to attend and take advantage of the free admission policy. Qualified family offices can sign up to attend for free here: <http://WilsonConferences.com/Family-Office-Registration/>

### BENEFITS OF ATTENDING:

The Family Office Super Summit is your annual opportunity to meet family offices, network with peers in the family office industry, gain valuable insights on the market, and build real relationships that move the needle in your business.

1. Hear directly from leading single family offices and top multi-family office executives on how to operate, grow, and invest capital as a family office.
2. Learn how to structure co-investments, source deals, and allocate capital both directly and to investment funds. You will see first-hand what criteria top family offices consider while selecting fund managers.
3. Connect face-to-face with ultra-wealthy families, family offices, and industry peers to share resources and discuss opportunities to work together.

### WHY REGISTER TODAY?

Seating is limited so register today to guarantee your seat. Not only will you have extra time to plan meetings around the event and take advantage of our Early-bird pricing, but you will also have the chance to save big on our limited number of discounted \$269/night rooms at the JW Marriott Miami.

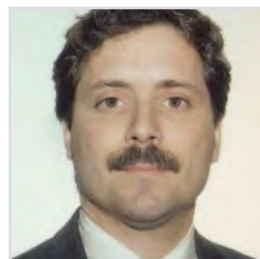
*I look forward to seeing you at the Family Office Super Summit.*



Richard C. Wilson  
Founder & CEO  
Wilson Conferences  
The Family Office Club  
77 Harbor Drive, Suite #76  
Key Biscayne, Florida 33149



# THE FAMILY OFFICE SUPER SUMMIT



**Sergio Pedro**  
Jones Family Office



**Karl Schade**  
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**Gary Monroe**  
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**Michael Studer**  
Oil & Gas Syndicate



**Harris S. Fried**  
Fried Family Office



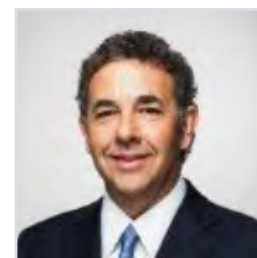
**Candice Beaumont**  
L Investments



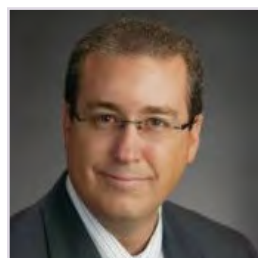
**Michael Sury**  
Indorus Holding



**Daniel Smith**  
Neuberger Berman



**James Cassel**  
Cassel Salpeter & Co.



**Aldo Palles**  
U.S. Trust



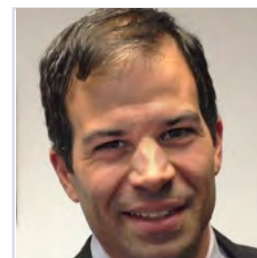
**Davide Accomazzo**  
Thalassa Capital



**Richard C. Wilson**  
Billionaire Family Office



**Russell Deakin**  
Providence Private Markets



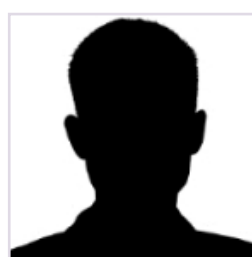
**Jonathan Bergman**  
TAG Associates



**Lorraine George-Harik**  
HPM Partners



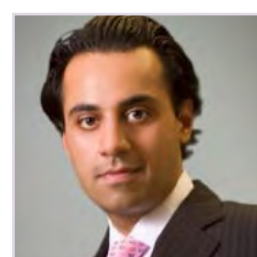
**Trevor Neilson**  
Global Philanthropy Group  
& G2 Investment Group



**Eric Munson**  
NY Based Family Office



**Anthony Ritossa**  
Ritossa Olive Oil  
Family Office



**Gautam Mahtani**  
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**Henley Smith**  
Oppenheimer & Co.



**Basil Trikatzopoulos**  
Noah Capital



**Timothy Smith**  
Petro Lucrum



**Theodore O'Brien**  
Billionaire Family Office



**Richard Stone**  
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**Howard Cooper**  
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**Michael Felman**  
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**Peter Pell**  
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**Ira Perlmutter**  
T5 Equity Partners



**Charles Bennett Sachs**  
Private Wealth Counsel



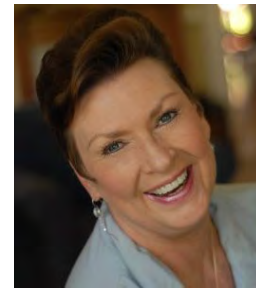
**Thaddeus R. Shelly III**  
Tiedemann Wealth  
Management



**Carol Pepper**  
Pepper International



**Paul Smith**  
NAPLIA



**Sheila Barry Driscoll**  
Billionaire Foundation

# The Family Office Super Summit

Day 1 | December 1st, 2015

## AGENDA

**Opening Remarks by Richard C. Wilson, CEO & Founder, Billionaire Family Office**

***Panel Discussion - Sourcing and Structuring Proprietary Direct Deals***

Panel Moderator: Harris S. Fried (Fried Family Office); Panelists: James Cassel (Cassel Salpeter & Co.); Guatam Mahtani (Customer Feedback Systems); Michael Felman (MSF Capital Advisors)

*Raised Healthy, Wealthy & Wise: Lessons from Grounded and Successful Inheritors on How They Got That Way*

Coventry Edwards-Pitt, Managing Director & Chief Wealth Advisory Officer, Ballentine Partners

***Panel Discussion - Real Estate Focus: Acquiring Attractive Properties, Increasing Returns, and Repositioning for Sale***

Panelists: Gary Monroe (Gilder Office for Growth); Peter Pell (CSM Capital Corp.)

***Consultative Selling to Families and Family Offices***

Leah Zveglich, Managing Partner, Aster Family Advisors

***Panel Discussion - Drilling for Deals: Opportunities for Energy Investors in Today's Turmoil***

Panelists: Daniel Smith (Neuberger Berman); Michael Studer (Oil & Gas Syndicate); Davide Accomazzo (Thalassa Capital)

### **Lunch & Break for Open Networking**

*Investing in change: How Philanthropy and Impact Investing are Redefining Cctivism for HNW Families*

Trevor Neilson, Global Philanthropy Group & G2 Investment Group

***Panel Discussion - Co-Investing & Clubs: Increasing Negotiating Power and Reducing Individual Risk***

Panelists: Basil Trikatzopoulos (Noah Capital); Carol Pepper (Pepper International);

***Co-Investing with Other Family Offices for Greater Returns and Lower Fees***

Michael Sury, Executive Director, Indorus Holdings

***Panel Discussion - Alternative Alpha: What Strategies are Generating Excess Returns for Investors?***

Panelists: Aldo Palles (U.S. Trust); Russell Deakin (Providence Private Markets)

**Closing Remarks, Open Networking Followed by Cocktail Hour**



# The Family Office Super Summit

Day 2 | December 2nd, 2015

## AGENDA

**Opening Remarks by Richard C. Wilson, CEO & Founder, Billionaire Family Office**

*Necessary Ingredients for Small Buyout & Co-Investment Success*

Karl Schade, CEO, The Presidio Group

*The Value of Independent Investment Advice: the Boldness to Make a Great Fortune, the Skill to Keep It*

Lorraine George-Harik, Founding Partner, HPM Partners

**Panel Discussion - Family Office Deal Requests – What Deals are \$1B+ Families Seeking Today**

Panelists: Howard Cooper (Cooper Family Office); Ira Perlmutter (T5 Equity Partners)

*The Importance of Global Diversification*

Frank Häusler, Chief Investment Officer, Marcuard Family Office

*Bracing Portfolios for the Return of Macro Risk*

Elliot Dornbusch, Chief Executive Officer, CV Advisors

**Panel Discussion - Pitch Me: Family Office Advice on Capturing Their Attention and Earning the Investment**

Panelists: Leah Zveglic (Aster Family Advisors); Jim Bertles (Tiedemann Wealth Management); John Jennings (St. Louis Trust Company)

**Lunch & Break for Opening Networking**

**Panel Discussion - Impact Investing, Philanthropy & Foundation Work by Billionaire Families**

Panelists: Sergio Pedro (Jones Family Office); Angie Sabel (Abbot Downing); Candice Beaumont (L Investments)

*Changing the Face of Venture Capital: Investing as a Family Office in VC Today*

Eric Munson, Director, NY Based Family Office

*Why is Volatility Reduction an Appropriate Risk Mitigation Practice*

Thaddeus R. Shelly III, Managing Director, Tiedemann Wealth Management

**Panel Discussion - \$1B Family Office Co-Investing and Joint Ventures**

Moderator: Theodore J. O'Brien (Billionaire Family Office) Panelists: Anthony Ritossa (Ritossa Olive Oil Family Office);

**Closing Remarks, Open Networking Followed by Cocktail Hour**

# Thank You To Our Sponsors

## CONFERENCE SPONSORS



Family Office Club



## MEDIA PARTNERSHIPS



## Interested In Becoming a Sponsor or Media Partner for the Family Office Super Summit?

We offer sponsorship opportunities to a select few firms who would like to introduce their offerings to our large network of investment professionals and family offices. If you are looking to establish your presence in the family office space, we can provide you with an excellent venue for meeting potential clients, marketing your firm, and becoming a "household name" in this industry.

For more information on sponsorship options and media partnerships email Alissa Bennett at [Alissa@WilsonConferences.com](mailto:Alissa@WilsonConferences.com)

# Who Attends Our Summits

## SINGLE FAMILY OFFICES



## LEADING MULTI-FAMILY OFFICES



## INSTITUTIONAL INVESTORS



## TOP ASSET MANAGERS



## WEALTH MANAGEMENT EXECUTIVES



## EXPERIENCED DEALMAKERS



## LEADING INVESTMENT BANKS





# BOOKING FORM

<b>The Family Office Super Summit</b>	<b>JW Marriott Miami</b>	<i>2015 Family Office Conference Series</i>
	<b>Dec. 1st-2nd</b>	 <b>Wilson.Conferences</b> <b>Single Admission</b>

<b>DELEGATE 1</b>	First Name	Last Name	
	Firm Name	Phone	Email
<b>DELEGATE 2</b>	First Name	Last Name	
	Firm Name	Phone	Email

<b>BOOKING DETAILS</b>  <u><b>Charter Membership Pass</b></u> Includes admission to all of our conferences and more benefits. (\$385 Initiation, \$197 Monthly)	<b>Family Office Super Summit   Dec. 1-2   Miami</b>	
	1 Delegate - \$995	3 Delegates - \$2,450
	2 Delegates - \$1,725	5 Delegates - \$2,997
	<b>Single Family Office Summit   March 2015   NYC</b> Super Early-Bird: \$875	

<b>PAYMENT DETAILS</b>		
Card Type	CCVCode	Expiration Date
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## Other Ways to Register

You can register online at [WilsonConferences.com/Reserve](http://WilsonConferences.com/Reserve), or by contacting us at [Reservations@WilsonConferences.com](mailto:Reservations@WilsonConferences.com), or (212) 729-5067.