

THE FAMILY OFFICE SUPER SUMMIT



Family Office Club



December 5th - 6th | Miami

SCHEDULE

Monday, December 4th, 2017

*Location: JW Marriott Marquis
255 Biscayne Blvd Way, Miami, FL 33131*

4:00 - 6:00 PM Early Arrivals Cocktail Reception

Tuesday, December 5th, 2017

*Location: JW Marriott Marquis
255 Biscayne Blvd Way, Miami, FL 33131*

7:00 - 8:00 AM Catered Breakfast, Check-in & Open Networking

8:00 - 12:00 PM Morning Session

- Direct Investing: Opportunities & 'Alligators'
- Invest Like A Rockstar: The Music Royalty Opportunity
- Co-GP Structures & Co-Investing: How to Partner with a Family Office to Close Your Next Deal
- Emerging Real Estate Markets
- Seeking Alpha: Generating Superior Returns through Alternative Investments
- Long-Term Value: Incorporating Private Equity and Direct Investments into Your Portfolio

12:00 - 1:30 PM Catered Lunch & Open Networking

1:30 - 5:15 PM Afternoon Session

- Successful Sr. Housing and Hotel Investing
- The Problem of Di-Worsification
- Real Investments: Constructing a Multi-Generational Real Estate Portfolio
- Test, Scale & Manage: Preserving Capital While Driving ROI Through Digital Arbitrage!
- Getting in on the Ground Floor: Risks and Rewards of Venture Capital and Early Stage Investments
- Managing Risk: How Family Client Advisors Protect Against Wealth Erosion
- Picking Winners: Family Offices and CIOs on Choosing Top Managers and Screening Investments

5:15 - 6:15 PM Closing Remarks & Cocktail Reception

Wednesday, December 6th, 2017

*Location: JW Marriott Marquis
255 Biscayne Blvd Way, Miami, FL 33131*

7:00 - 8:00 AM Catered Breakfast, Check-in & Open Networking

8:00 - 12:00 PM Morning Session

- The Close: How to Raise Capital from Family Offices and Institutional Investors
- Untapped Potential: Searching for High Cap Rates, Booming Property Markets, and Undervalued Real Estate
- Investing in Society: Family Office Philanthropy and How Impact Investing is Changing the Equation
- Family Office Titans: What the Largest \$1B+ Family Offices Invest in and How They Operate
- Rapid Reaction: Real-Time Investment Feedback from Family Offices

12:00 - 1:00 PM Closing Remarks & Cocktail Reception

Wednesday, December 6th, 2017

6:00 PM - 10:00 PM Red Dot | Spectrum | Art Spot Show



Location: 1700 NE 2nd Ave | Miami, FL 33132
*Tickets provided at the Family Office Super Summit

Thursday, December 7th, 2017

10:00 AM - 1:00 PM VIP Brunch Preview at Pulse Art Fair- Miami Beach

1:00 PM - 5:00 PM Show Hours at Pulse Art Fair- Miami Beach



Location: Indian Beach Park, 4601 Collins Avenue, Miami Beach
*Tickets provided at the Family Office Super Summit

8:00 PM - 12:00 AM National Hotel - South Beach



Location: 1677 Collins Avenue, Miami Beach, FL 33139
*Tickets provided at the Family Office Super Summit

SPEAKERS

JW Marriott Marquis Miami



Chris Chandler
Ballentine Partners



Lorraine George-Harik
HPM Partners



Garbis Mechigian
CTC | myCEO



Andres Bethencourt
Amzak



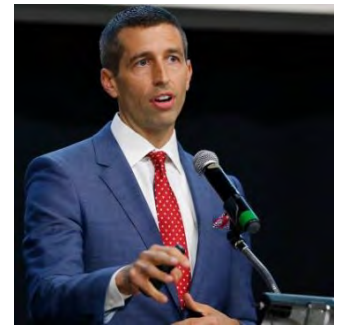
James Cornell
Fiduciary Wealth
Partners



Allen Morris
The Allen Morris
Company



Matthias Boizard
Fiducial



Richard Wilson
The Miami Family
Office



Ira Perlmutter
T5 Equity Partners



Andrew Mehalko
AM Global



Paul Kang
AltaCap



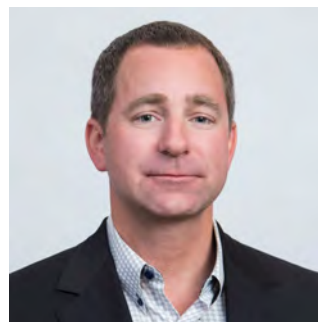
Jeff Evans
Volta Global



William DuBois
Pilotage Private
Wealth



Anuj Jain
ARJ Strategy Partners



Jeff Klotz
The Klotz Group of
Companies



Richard Beletz
Alternative
Investment Resource

SPEAKERS

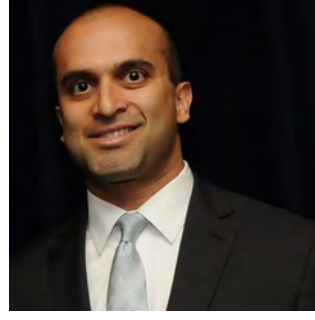
JW Marriott Marquis Miami



Jared Oakes
Benesch



Colin Hickey
AM Global Family Office



Adi Divgi
EA Global



Richard Klitzberg
McDaniel College



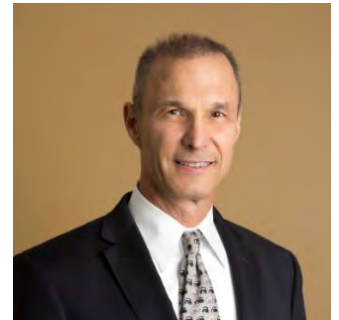
Benjamin Marks
Leveraged Equity
Holdings LLC



Kermit Claytor
Kings Mountain
Capital Group



Sasha Bernier
Cheltenham
Enterprises



Vaughn Brock
Veritas Family
Partners



Clifford Friedman
Raptor Group Holdings



Ethan Boothe
EisnerAmper LLP



Ziad Moukheiber
Boston Harbor Angels



William Podd
Landmark Angels



Federico Benavides
Beamonte
Investments



Carlos Imery
IP Family Office



Thomas Webb
Pebb Enterprises



Roey Diefendorf
3 Dimensional
Wealth Advisory

SPEAKERS

JW Marriott Marquis Miami



Brian Shelley
Colmena Capital



Cliff Oberlin
Oberlin Wealth Partners



Sylvia Benito
GenSpring Family
Offices



Andrew Clark
Houston Angel
Network



Irwin Boris
Heritage Capital Group



David Lindahl
The Lindahl Group



Jeff Schneider
The Royalty Exchange



Mark Hamister
Hamister Group LLC



Max DeZara
Akoya Capital Partners



Ron Happe
Main Street Capital
Partners



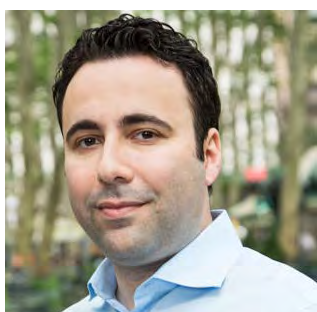
Chad Naylor
Naylor & Company
Investments



Fadi Ephtimios
Group RMC



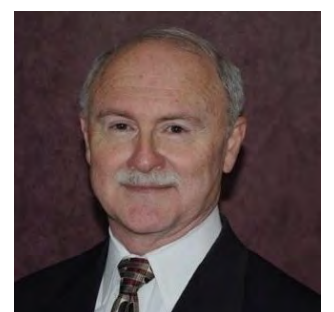
Skip Motsenbocker
Floris Capital
Management LLC



Jason Fooks
Safety, Income & Growth



Paul Gabrail
Select Investment
Group



Doug Fullaway
FourteenPlus, LLC

SPEAKERS

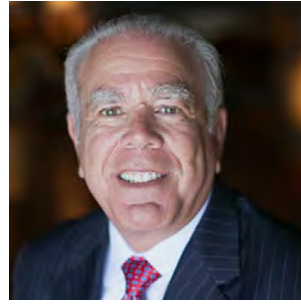
JW Marriott Marquis Miami



David Weiss
Rebel Rebel Capital



Alan Snyder
Shinnecock Partners



Steven Wagner
Omnia Family Wealth



Silvia Rosen
LionX Advisors



Yazan Abdeen
Private Family Office



Veronica Yepez Reyna
Perpetum



Katherine Boas
Carl Marks & Co.



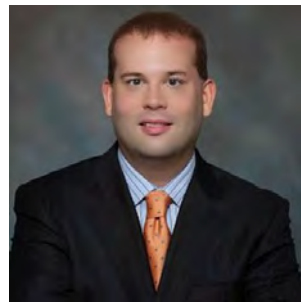
Andrew Ury
ActX



JP Maroney
Harbor City Capital



Wirth Munroe
Aon Risk Solutions



William Werkmeister
National Foundation
for Cancer Research



Monty Elsabbagh
Family Office Tech



Eduardo Gruener
GFG Capital



Christopher "Kit" Boyatt
Lazard Asset
Management



Evan Renov
Beechwood Ventures



Julie Neitzel
WE Family Offices

SPEAKERS

JW Marriott Marquis Miami



Pierre duPont
HPM Partners



Dan Farrell
Privos Capital



Brian DeLucia
Arrivato



Anton Bayer
Harris Bay

AGENDA

Day 1 | December 5th

7:00 Check-In, Catered Breakfast & Opening Networking

8:00 **Opening Remarks**
Richard C. Wilson, The Family Office Club

Panel Discussion – Direct Investing: Opportunities & ‘Alligators’

Panel Moderator: Ethan Boothe (EisnerAmper LLC)

8:30 Panelists: Andres Bethencourt (Amzak); Ira Perlmutter (T5 Equity Partners); Cliff Oberlin (Oberlin Wealth Partners); Pierre duPont (HPM Partners); Brian DeLucia (Arrivato)

9:15 **Invest Like A Rockstar: The Music Royalty Opportunity**
Jeff Schneider, The Royalty Exchange

Panel Discussion – Co-GP Structures & Co-Investing: How to Partner with a Family Office to Close Your Next Deal

Panel Moderator: Katherine Boas, Carl Marks & Co.

9:30 Panelists: Sasha Bernier (Cheltenham Enterprises); Jeff Klotz (The Klotz Group of Companies); Fadi Ephtimios (Group RMC); Irwin Boris (Heritage Capital Group); Evan Renov (Beechwood Ventures)

10:15 **Emerging Real Estate Markets**
David Lindahl, The Lindahl Group

Panel Discussion – Seeking Alpha: Generating Superior Returns through Alternative Investments

Panel Moderator: Richard Beleutz (Alternative Investment Resource)

10:30 Panelists: Andrew Mehalko (AM Global Family Investment Office); Chris Chandler (Ballentine Partners); Alan Snyder (Shinnecock Partners); Monty Elsabbagh (Family Office Tech); Christopher "Kit" Boyatt (Lazard Asset Management)

Panel Discussion – Long-Term Value: Incorporating Private Equity and Direct Investments into Your Portfolio

Panel Moderator: Doug Fullaway (FourteenPlus, LLC)

11:15 Panelists: William DuBois (Pilotage Private Wealth); Clifford Friedman (Raptor Group); Andrew Ury (ActX); Anuj Jain (ARJ Strategy Partners); Dan Farrell (Privos Capital)

12:00 Catered Lunch & Open Networking

1:30 Successful Senior Housing and Hotel Investing Generational
Mark E. Hamister, Hamister Group LLC

1:45 The Problem of Di-Worsification
Andrew Mehalko, AM Global Family Office Investment Office

Panel Discussion – Real Investments: Constructing a Multi-Generational Real Estate Portfolio

2:00 Panel Moderator: Paul Gabrail (Select Investment Group)
Panelists: Allen Morris (The Allen Morris Company); Vaughn Brock (Veritas Family Partners); Brian Shelley (Colmena Capital); Thomas Webb (Pebb Enterprises); Jared Oakes (Benesch)

2:45 Test, Scale & Manage: Preserving Capital While Driving ROI Through Digital Arbitrage!
JP Maroney, Harbor City Capital

Panel Discussion – Getting in on the Ground Floor: Risks and Rewards of Venture Capital and Early Stage Investments

3:00 Panelists: William Podd (Landmark Capital Corp.); Ziad Moukheiber (Boston Harbor Angels); Federico Benavides (Beamonte Investments); Skip Motsenbocker (Floris Capital Management); Andrew Clark (Houston Angel Network)

Panel Discussion – Managing Risk: How Family Client Advisors Protect Against Wealth Erosion

3:45 Panelists: Benjamin Marks (Leveraged Equity Holdings LLC); Roey Diefendorf (3 Dimensional Wealth Advisory); Jason Fooks (Safety, Income & Growth Inc.) James Cornell (Fiduciary Wealth Management LLC); Sylvia Benito (GenSpring Family Offices); Veronica Yepez Reyna (Perpetum)

Panel Discussion – Picking Winners: Investment Analysts and CIOs on Choosing Top Managers and Screening Investments

4:30 Panelists: Adi Divgi (EA Global); Yazan Abdeen (Private Family Office); Chad Naylor (Naylor & Company Investments); Richard Klitzberg (McDaniel College); David Weiss (Rebel Rebel Capital)

5:15 Closing Remarks
Richard C Wilson, The Family Office Club

5:30 Cocktail Reception

AGENDA

JW Marriott Marquis Miami

Day 2 | December 6th

7:00 Check-In, Catered Breakfast & Opening Networking

8:00 Opening Remarks
Richard C. Wilson, The Family Office Club

8:30 Panel Discussion – The Close: How to Raise Capital from Family Offices and Institutional Investors

8:30 Panelists: Carlos Imery (IP Family Office); Jeff Evans (Volta Global); Max DeZara (Akoya Capital Partners); Eduardo Gruener (GFG Capital)

9:15 Private Equity Real Estate
Anton Bayer – Harris Bay

9:30 Panel Discussion – Investing in Society: Family Office Philanthropy and How Impact Investing is Changing the Equation

9:30 Panelists: Chris Chandler (Ballentine Partners); William Werkmeister (National Foundation for Cancer Research); Steven Wagner (Omnia Family Wealth); Lorraine George–Harik (HPM Partners)

10:15 Hedge Fund Friend or Foe
Julie Neitzel – WE Family Offices

10:30 Panel Discussion – Family Office Titans: What the Largest Family Offices Invest in and How They Operate

10:30 Panelists: Wirth Munroe (Aon Risk Solutions); Garbis Mechigian (CTC | myCFO); Yazan Abdeen (Private Family Office); Matthias Boizard (Fiducial)

11:15 Panel Discussion – Rapid Reaction: Real-Time Investment Feedback from Family Offices

11:15 Panel Moderator: Richard C. Wilson (The Family Office Club)
Panelists: Kermit Claytor (King Mountain Capital Group); Ron Happe (Main Street Capital Partners); Silvia Rosen (LionX Advisors); Paul Kang (AltaCap)

12:00 Closing Remarks

12:15 Reception & Open Networking

PARTNERS



Black River Technologies Inc.

PARTNERS

HARBORCITY

ZENITHJET

sig
select investment group

SHMCONTROLS

OneChicago ✕
The Securities Finance Exchange

ActX

Family Office Club Wines

HARRIS BAY
— a real estate investment company —

FamilyOffice
Tech.com

FlexFunds

PRIVATE WEALTH
SYSTEMS

RenPSG
PHILANTHROPIC
SOLUTIONS GROUP

MEDIA PARTNERS

FLORIDA ANGEL
NEXUS

MIAMI
FINANCE
FORUM

PBHFA
Palm Beach Hedge Fund Association

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HEDGE CONNECTION



BOOKING FORM

<h2>The Family Office Super Summit</h2>	<p>JW Marriott Marquis Miami</p> <hr style="border: 0; border-top: 1px solid white;"/> <p>Dec. 5-6th</p>	<p><i>Single Admission</i></p> <p>2017 Event Series</p>
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DELEGATE 1	First Name	Last Name
Firm Name	Phone	Email
DELEGATE 2	First Name	Last Name
Firm Name	Phone	Email

BOOKING DETAILS	Super Summit December 5-6th Miami				
Charter Membership Pass Includes admission to all of our conferences and more benefits. (\$299 Monthly)	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">1 Delegate - \$995</td> <td style="width: 50%;">3 Delegates - \$2,650</td> </tr> <tr> <td>2 Delegates - \$1,795</td> <td>5 Delegates - \$3,975</td> </tr> </table>	1 Delegate - \$995	3 Delegates - \$2,650	2 Delegates - \$1,795	5 Delegates - \$3,975
1 Delegate - \$995	3 Delegates - \$2,650				
2 Delegates - \$1,795	5 Delegates - \$3,975				
	Capital Raising Boot Camp February (Multiple Cities)				
	1 Delegate - \$995				

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Other Ways to Register

You can register online at FamilyOffices.com/Super or by contacting us at (305) 503-9077.