

Day 1 – Tuesday, April 20, 2021

For access to the forum, login to the event portal at <https://event.crowdcompass.com/gifv21>
All times are in Central Time

10:00 am Welcome and Opening Remarks

Gaby Griffin, Market Leader, Business Owners and Family Office Executives, FOX
Matthew Murphy, Director, Business Development, FOX

10:20 am Compassion Coupled with Return: Using Capital to Create Equal Opportunity

Valerie Mosley, Founder of BrightUP and Chief Executive Officer, Valmo Ventures

Moderator: Gaby Griffin, Market Leader, Business Owners and Family Office Executives, FOX

Valerie Mosley, a Founder and Chief Executive Officer with over 30 years of investing experience, will kick off the forum with an eye-opening presentation that examines factors permeating wealth inequality in the United States. Valerie will highlight trends like low interest rates and the growing commitment to impact investing as large corporations continue to focus on de-risking their pension schemes. She will explain how these trends can be leveraged to create win-win situations that result in not only returns, but positive impact. The session will include compelling personal stories and an explanation of how investors can create fairly priced funds and capital for the greater good.

11:10 am Break**11:25 am From Cryptocurrency to Private Equity: What's New in Family Office Alternative Investments?**

Ben Buettell, Director, Fusion Acquisition Corp. and Co-Founder/Former Partner of R7 Partners

Brent Hill, Managing Partner, Origin Ventures

Kristen Jones, Partner, Private Equity and Private Credit Research Analyst, Albourne Partners

Dr. Wolf von Laer, CEO, Students For Liberty

Moderator: Matthew Murphy, Director, Business Development, FOX

Panelists will discuss the popular alternative investments that family offices are considering. Everything from private equity funds to cryptocurrencies to SPACS will be examined.

12:45 pm Day 1 Concludes

Day 2 – Wednesday, April 21, 2021

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10:00 am **Introduction to Day 2**

David Toth, Managing Director, FOX

10:20 am **Risk and Return: Investing in Asia Amidst Political Tension**

Alex Gong, CFA, Fonex Group
Jonathan Krane, Chief Executive Officer, KraneShares

Moderator: Miguel López de Silanes Gómez, International Market Leader, FOX

US-China tension is a key market driver in 2021. This session will focus on the family office investment landscape in Asia with a focus on China.

11:10 am **Break**11:25 am **Breakout Sessions**▪ **The Art and Science of Managing Investment Managers**

Phil Durst, Chief Investment Officer, Brush Street, a division of Ford Estates, LLC
Kathleen Vogelsang, Chief Investment Officer, Van Andel Institute
Anthony Waskiewicz, President and Chief Investment Officer, Investment Office Resources, LLC

Moderator: David Toth, Managing Director, FOX

Learn the best practices of selecting, retaining, and compensating portfolio managers. Attendees will find out how to identify the right people with expertise that fits their family office's specific needs, as well as how to construct a hybrid model of in-house and outsourced talent.

▪ **Navigating the Direct Investing Deal Ecosystem**

Jonathan Tunner, Director, Private Investment Opportunities, FOX

Moderator: Tim Duffy, Esq., General Counsel, Manager of Strategic Partnerships, FOX

FOX's Director of Private Investment Opportunities will explain the family office direct investing deal ecosystem. This session is introductory and will cover 12 critical direct investing functions and roles for successfully getting deals done. Major components of the ecosystem will be covered, which include deal sourcing, deal execution, deal monitoring and deal management.

12:15 pm **Break**1:00 pm **Speed Networking for Deal-Making (Families and Single Family Office Executives Only)**

Tim Duffy, Esq., General Counsel, Manager of Strategic Partnerships, FOX
Nate Hamilton, CFA, FOX Advisory Board Member

If you are interested in deal-making, this session is for you. Attendees will be put into breakout rooms of four people to network in 15-minute meetings. Bring your investing expertise and an explanation of how you can add value to a deal.

***Please note attendees in this breakout are required to have cameras and mics on for the entire session.*

2:00 pm **Day 2 Concludes**

Day 3 – Thursday, April 22, 2021

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10:00 am **Introduction to Day 3**

Jonathan Tunner, Director, Private Investment Opportunities, FOX

:20 am **Lessons Learned from a Successful Serial Investor**

Barry Dorfman, Founder and President, BLD Holdings, Inc.

Moderator: Miguel López de Silanes Gómez, International Market Leader, FOX

Hear from an active investor in early-stage deals who has invested in over 150 deals since leaving his medical practice. Attendees will hear his lessons learned from the early stages and how he identifies strong investment partners in international markets. He will also explain his family office structure that includes two CIOs and what he has taught his children about good investment partners.

11:10 am **Break****11:25 am** **Breakout Sessions****▪ Finding Opportunity in the 2021 Real Estate Market**

Andy Gloor, Chief Executive Officer, Sterling Bay

Christopher Merrill, Co-Founder, Chairman, and Chief Executive Officer, Harrison Street

Rich Ratke, Managing Partner, Walton Street Capital

Moderator: Gaby Griffin, Market Leader, Business Owners and Family Office Executives, FOX

Panelists will discuss the good, the bad and the ugly when it comes to real estate investing in 2021. As some components of real estate thrive and others die, what is the true outlook for the real estate industry? What will infrastructure and digital assets look like as 5G rolls out? How should commercial real estate investors navigate the new landscape? These questions and more will be addressed.

▪ Family Impact and ESG Investing: Building a Holistic Portfolio

Brett Wayman, Vice President, Impact Investing, Envestnet

Joel Wittenberg, Former Chief Investment Officer, W.K. Kellogg Foundation

Moderator: Stephanie Simmons, Senior Relationship Manager, FOX

Both an institutional and a mainstream impact investor will clarify their different definitions of ESG versus impact investing, opportunities they see coming down the pipeline, as well as what impact investing strategy implementation roadblocks and successes look like. The discussion will also cover how impact investing due diligence is different from the standard due diligence process, and panelists will give their thoughts on how to measure impact investments through benchmarking and technology.

12:15 pm **Forum Concludes**