

DALLAS, TX

IPI Fall Forum

The Institute for Private Investors
is in Dallas for the IPI Fall Forum,
Oct 11-13.

The Fall Forum focuses on investing across financial markets and the industries of real estate, energy and healthcare. We uncover emerging ideas across these industries and understand how they support the traditional drivers of growth. The Forum will provide you with the intel to make better decisions as investors. Alongside leading speakers and educational sessions, IPI's members will facilitate smaller group Member Exchange discussions across the two-days and of course there will be plenty of networking opportunities.

Alternative Fund Event & Pre- Forum Cocktail Reception

DALLAS, TX

DATE & TIME

Tuesday, October 11, 2022

2:30p–6:00pm Alt Fund Event

6:00–7:30pm Cocktail Reception

HALL Arts Hotel,

1717 Leonard Street, Dallas, TX

IPI Alternative Fund Event in Dallas October 11th, 2:30-6:00pm

The Alt Fund Event introduces innovative and under-the-radar managers to the active family and private investor community. You should attend if you are interested in public and private market alternative investment strategies such as private equity, private debt, real estate, agriculture, venture capital and hedge fund. Presenters include:

Self-Storage Real Estate

WILLIAM WARREN GROUP

Self storage performs well in both recessionary and expansionary market cycles. It is a defensive, cash-flowing asset class with attractive current yields and has exhibited strong out-performance vs. other property sectors over various time periods with higher average annual returns and lower volatility. Long term demographic shifts favor increased demand trends with millennials using storage at a higher rate than other demographic cohorts.

Farming and Agriculture

GOLD LEAF

Gold Leaf Farming owns and operates almond, pistachio, and date farms in California and Arizona. We hold traditional farming values in high regard: taking pride in quality operations, only buying farms we'd be happy to own forever, and staying grounded in values like hard work, responsibility, and integrity. As next-generation growers, we build upon that tradition with a focus on sustainability, responsible employment, and technology.

Consumer VC

SELVA VENTURES

Selva ventures is an early stage venture fund that specialize in emerging consumer brands in categories like F&B, Beauty and Personal, Pets, Wellness, Apparel and Home Goods with less than \$10m in revenue sales. Selva is led by Kiva Dickinson who was previously a partner at CircleUp and an investor at TPG Capital.

Energy Transition Options

Houston, TX-based strategy led by experienced founders. The strategy is broadly focused on companies tied to the energy transition and the buildout of basic infrastructure, 100% public, more tactical and a frequent seller of volatility in the listed options market. The Fund will generally invest in the underlying publicly traded stocks and options of 15-25 companies.

Pre–Fall Forum Cocktail Reception in Dallas October 11th, 6:00–7:30pm

Day One Schedule

8:00A–8:45A BREAKFAST & REGISTRATION—31ST FLOOR

9:00A–9:10A WELCOME INTRODUCTION BY BRIEN BIONDI, CEO, IPI & CAMPDEN WEALTH AMERICAS

9:10A–9:40A

Icebreaker Networking

Start your networking and community experience from the first morning of the event. During this short networking session, you will go around the table, introduce yourself, and share your meeting goals with surrounding peers.

9:40A–10:20A

General Session

Matthew Kuta is the Co-Founder, President, and CEO of Voyager Space Holdings. He was also the founding Executive Director for Space for Humanity, a non-profit organization that will send diverse passengers into orbit on commercial space vehicles.

Matthew Kuta
Co-Founder, President & CEO,
Voyager Space

10:20A–10:40A REFRESHMENT & NETWORKING BREAK—

10:40A–11:20A CONCURRENT SESSION

Evaluating Private Market Funds

Evaluating private investment fund managers has always been challenging. Steve's session will review quantitative and qualitative approaches, including z-scores, learning curves, regression, and correlation, with the aim to separate luck from skill when evaluating private investment fund managers.

Steve Kim
Partner,
Verdis Investment Management

The Digital Single-Family Office

How do family offices keep pace with their competition in the management and professional services industries who are investing billions in digital? In this session, Bobby will share key opportunities for digital differentiation and risk management in a rapidly evolving landscape.

Bobby Stover
Partner; Americas Family
Enterprise and Family Office
Leader
EY

11:20A–11:40A REFRESHMENT & NETWORKING BREAK—

11:40A–12:25P CONCURRENT SESSION

Concurrent Session

Member Exchange: Choosing, and Integrating, Technology

Service providers offer a plethora of options—all shiny and new. In this discussion session we focus on technology and its adoption by families. We will talk about the selection and diligence process; and different use cases, from members who have integrated technology into their processes. This is a discussion-based session for members to talk about their experiences in order to support all in attendance. Capped at 20 members.

Biff Pusey and Brian Adams
IPI Members

12:25P–1:35P LUNCH —

1:40P–2:25P CONCURRENT SESSION

Investing in Longevity

All of us would like healthier and longer lives. What can we do today, in the near future, and in a decade from now? Given these potential advances, how can we invest in them? Please join us for a presentation by Nils Regge, a serial entrepreneur in health & biomedicine, followed by an active discussion on these topics.

Nils Regge
Co-Founder and Managing Director,
Apollo Health Ventures

Heinz Blennemann
IPI Member

Single Family Rental

The imbalance between supply and demand in the single family rental market isn't going away and hardly slowed through the first half of 2022. What does the economic environment mean for the sector and how should we react. In this session we look at the data coming out of the market, its direction and the place of SFRs in a real estate portfolio.

Chris Skardon
CIO and co-CEO Single Family Rental,
Bridge Investment Group

2:25P–2:45P REFRESHMENT & NETWORKING BREAK—

2:45P–3:30P CONCURRENT SESSION

Investing In The Middle Market During Volatile Times

Michael Drexler
Managing Director and Chief Strategy Officer,
Brighstar

Nuclear Is Here... No, Really, It Is!

In this session we deliver an update on the policy and investment opportunity that exists within nuclear energy. The sector has been rejuvenated by supporters of climate tech; the development of fission-based small modular reactors; and buoyed by claims that fusion's commercialization has never been closer! Kurt was the first director of Booz Allen Hamilton National Innovation Center in Washington DC and served in the Marines as a AH-1W Cobra pilot.

Kurt Scherer
Managing Partner,
C5 Capital

3:30P–3:50P REFRESHMENT & NETWORKING BREAK—

3:50P–4:30P

Space and Defense—The Upstarts and Incumbents

The interplay between defense and space is nothing new. Unsurprisingly, incumbents in the defense industry are also the biggest operators in the space industry. Over a span of 40-years, Richard Ambrose has led teams in the aerospace and defense industry including for 20-years at Lockheed Martin Space, a business that employs more than 22000 people.

Richard Ambrose
Board Member; Former Head of Space at Lockheed Martin
Textron

4:30P–5:10P

General Session

5:10P– 6:30P COCKTAIL RECEPTION—

6:40P and 6:50P LEADERS COUNCIL DINNERS

Day Two Schedule

8:00A–8:45A BREAKFAST & REGISTRATION—

8:00A–9:40A

Co/Direct Investment and Dealflow

IPI dealflow is a member-led program that involves direct/co-investment and fund opportunities shared by IPI members. We'll hear from:

Comma is revolutionizing reproductive health through sustainable products, secure data, and public health insights.

Miller Morris
Founder & CEO,
Comma

Materials science company that has developed an antimicrobial nanosurface that can bind to any metallic or polymeric surface. The technology can be applied to medical devices to prevent contamination and protect humans from pathogens.

David Nichols
CEO,
Orthobond

Recapitalization of The Lookout at Comanche Hill, a 150-unit apartment property in San Antonio, Texas. It has a strong standing in the submarket for the profound essential worker class in the Live Oak and Universal City area.

Yuen Yung
CEO,
Casoro Group

Deal 4

10:00A–10:05A WELCOME INTRODUCTION BY BRIEN BIONDI, CEO, IPI & CAMPDEN WEALTH AMERICAS

10:05A–10:45A

Member Spotlight

Steve Fifield has spent 40 years operating and building his real estate business, Fifield Companies. We sit down with him to open our IPI Member Spotlight series in which we delve into the person behind the business; lessons of leadership and investing and, in Steve's case, his views on real estate.

Steve Fifield
IPI Member; Founder and CEO
Fifield Companies

Yuen Yung
CEO,
Casoro Group

10:45A–11:00A REFRESHMENT & NETWORKING BREAK—

11:00A–11:40A CONCURRENT SESSION

Co-Invest in Detail

Co-Investment options and opportunities are a growing part of the LP and GP market place. SPV's /sidecar use is proliferous, adopted by private investors, family offices and of course GPs. In this session we look to get technical and hear about the options available and rationale behind the choices .

Chris Schonk
IPI Member; Co-Founder & Managing Partner,
ATX Ventures

Private Assets in Portfolio Construction and Capitalizing on Current Trends

This session will focus on the role alternatives should play in total portfolio construction, and the ability to reduce volatility and increase returns by employing a strategy of diversification among asset classes, managers and strategies. Additionally, the speaker will discuss the trends to take advantage of during a market dislocation, navigating through current portfolio and operational challenges, and the opportunities that will drive returns over the next economic cycle.

Doug Dougherty
Senior Advisor,
Gridline

11:40A–12:00P NETWORKING & REFRESHMENT BREAK—THE GALLERY

12:00P–12:40P

Lucy Billingsley in Conversation

Lucy Billingsley has spent her career in real estate, developing and managing commercial developments. Lucy started Billingsley Company with her husband, Henry, in 1978 to manage their growing real estate portfolio in the Dallas/Fort Worth area. Lucy is part of the rich family heritage in Dallas. Her father was the renowned developer Trammel Crow. We are delighted that she joins us at IPI to be interviewed by IPI member Dupree Scovell, himself continuing the legacy of another family steeped in local history that is also tied to the real estate industry.

Lucy Billingsley
Partner
Billingsley Company

Dupree Scovell
IPI Member; Managing Partner and CIO,
Woodbine

12:40P–1:40P LUNCH—

1:45P–2:30P CONCURRENT SESSION

Investing in SaaS

Industry's unstoppable move toward software services is not determined by consumer appetite but businesses striving for improvements. Serial investor Keith Nilsson shares how companies distinguish themselves today including the role and integration of AI/ML and the impact on valuations in this segment of venture.

Keith Nilsson
Co-Founder and Managing Partner,
Xplorer Capital

Needs & Leads

A member-led session designed to tap into the insight and connections of fellow peers in a confidential setting. A great opportunity for members to share their pressing investment and business challenges and receive peer support. Capped at 25 participants.

Smoke Wallin
IPI Member

2:30P–2:45P REFRESHMENT & NETWORKING BREAK—THE GALLERY

2:45P–3:30P CONCURRENT SESSION

Emerging Ideas — Real Estate

The supply of housing continues to fall behind demand; exacerbated by a shortage of construction workers. 3D house printing is one solution that could bolster supply. Using an on-site rather than factory model, Jack Oslan Ageis building houses on location in less time than traditional methods. It combines automation with human skills to produce each home. We hear about the process and potential of this growing part of the real estate market.

Jack Oslan
Co-Founder,
Diamond Age

Emerging Ideas — Private Equity

Traditional industries are often overlooked in the wave of excitement propelled by growth tech, but they are the heartbeat of the economy. They are also fundamental to many private equity firms that want to extract value from existing, successful businesses. In this session we examine how data and technology can underpin the investing process to unearth deals in traditional lower middle market industries.

Kevin McAllister
Founder and Managing Director,
Access Holdings

3:30P CLOSE & INFORMAL NETWORKING



Registration

Members of the IPI/Campden Wealth Community can register here:

[REGISTER HERE](#)

Or for more information, please contact:

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