



PRIVATE MEETINGS FOR THE WORLD'S LEADING FAMILIES

NORTH AMERICAN CAMPDEN WEALTH/IPI MEGA TRENDS FORUM

How will the next 25 years change your world?

APRIL 13TH-15TH, 2021 • VIRTUAL MEETING

Organized by:



PROGRAM DAY ONE*(Times shown in EST)**Tuesday, April 13th, 2021***11:00AM WELCOME****BRIEN BIONDI** • CEO, Campden Wealth, Americas & Institute for Private Investors**11:05AM CHAIRMAN'S OPENING REMARKS****R. TODD RUPPERT** • Founder, Ruppert International, Venture Partner, Greenspring Associates, retired CEO, T. Rowe Price Global, Board Member, INSEAD Business School, Rock & Roll Hall of Fame, & Others**11:15AM OPENING CONVERSATION: THE FAMILY OFFICE VIEW**

Mark Sortir runs the family office for an iconic Chicago family, the Zells. Mark focuses on maximizing and sustaining value through a multi-faceted approach. Uncover how this family office views the current investment landscape and potential dangers they are anticipating.

MARK SOTIR • President, Equity Group Investments (EGI)

In conversation with: **THOMAS KIM, Ph.D., CAIA** • President & Chief Investment Officer, The Agnew Company

12:00PM ALTERNATIVE INVESTMENT OPPORTUNITIES IN BLOCKCHAIN

Blockchain and digital finance is the financial technology of the future. During the session, sector experts will be providing a overview to the sector, technology and how it will impact the world of finance. Some of the themes they will discuss are:

- The safest onramp into digital assets: Bitcoin
- Bitcoin has surpassed the 1 trillion market cap; what key drivers will take the digital asset to 2 trillion?
- Understanding Alternative Investments in the 'Roaring 20's': A look at the incentives, strategies and advantages for family office investment in crypto during the 2020's

ZACHARY FRIEDMAN • Co-Founder & COO, GDA Group**JAMES GODFREY** • Director, Digital Asset Lending & Corporate Banking, GDA Group**DAVID SHAFRIR** • Co-Founder, Executive Chairman & CEO, GDA Group**12:30PM NETWORKING SESSION**

Randomly assigned small group networking session — admittance until 12:35pm. If late, please do not join the room and wait until the next session.

1:00PM BREAK**2:30PM STATE OF THE UNION ON AERIAL MOBILITY**

Flying cars are coming and they're coming fast. Over 400 companies are developing some sort of flying car they're going to start arriving this year. Estimated to be a \$1.5 trillion market in just 20 years, the technology is innovating at a dizzying pace—far faster than its closest equivalent, the automobile industry. Learn about this exciting new future from Cyrus Sigari, Co-founder & Managing Partner of UP.Partners, who is a life-long aviator, successful multi-business entrepreneur and advanced air mobility industry venture investor, who has dedicated his life to helping humanity go UP. His knowledge and dedication to flight has given him a holistic perspective on the past, present and future of advanced aerial mobility solutions. In this presentation, Cyrus will showcase the rapid pace of eVTOL (electric vertical take off and landing) and autonomous vehicle evolution; how technology, regulatory, investment, and geopolitical forces are aligning behind aerial mobility; and what companies are leading the charge for transporting goods and people into a three dimensional future.

CYRUS SIGARI • Co-Founder & Managing Partner, UP.Partners

PROGRAM DAY ONE
Tuesday, April 13th, 2021

(Times shown in EST)

3:00PM **NETWORKING SESSION**

Randomly assigned small group networking session — admittance until 3:05pm. If late, please do not join the room and wait until the next session.

3:45PM **KEYNOTE CONVERSATION WITH JOE LONSDALE**

The phrase “data equals dollars” has never been more true. Advances in big data and informatics are reshaping the world’s largest industries, including finance, biotechnology, logistics, and government. This, in turn, is dramatically improving how our society is able to allocate resources and creating historic opportunities for investors to fund generational businesses. Co-founder of Palantir Technologies, Addepar, and OpenGov and 8VC General Partner Joe Lonsdale will share his insight into capitalizing on these trends and their implications for your family office and companies.

JOSEPH LONSDALE • *Co-Founder, Palantir, Addepar & Founder, 8VC*

In conversation with: DOUG MELLINGER • *Managing Director, Clarion Capital Partners LLC*

4:30PM **END-OF-DAY SPEED NETWORKING**

During this interactive networking session, you will be given a chance to speed meet five community members during short meetings. You will randomly be placed with one other member for four minutes to chat and exchange business cards/contact details. This process will be repeated five times.

PROGRAM DAY TWO*(Times shown in EST)**Wednesday, April 14th, 2021*

- 11:00AM** **WELCOME**
BRIEN BIONDI • CEO, Campden Wealth, Americas & Institute for Private Investors
- 11:05AM** **CHAIRMAN'S OPENING REMARKS**
R. TODD RUPPERT • Founder, Ruppert International, Venture Partner, Greenspring Associates, retired CEO, T. Rowe Price Global, Board Member, INSEAD Business School, Rock & Roll Hall of Fame, & Others
- 11:15AM** **KEYNOTE CONVERSATION WITH JESSICA O. MATTHEWS**
The US has seen a dramatic shift from fossil fuels towards renewable energy in the last decade and the Biden administration has committed to invest \$400B into clean energy and innovation over the next 10 years. Jessica O. Matthews, who has called herself a “perfect mashup between Bill Nye the Science Guy and Beyoncé” will share her story from creating innovative energy solutions to fundraising the largest Series A by a black female founder.
JESSICA O. MATTHEWS • Co-Founder, Uncharted Power
In conversation with: AVRIL WESTERMAN • Director of Investments, Westerman Family Office
- 12:00PM** **TRUSTING TECHNOLOGY: HOW FAMILY OFFICES CAN LEVERAGE TECHNOLOGY TO STAY AHEAD OF KEY TRENDS, NEEDS AND CHANGING EXPECTATIONS**
The family office industry is evolving as key technology and demographic trends are changing the family office needs and how they operate. Family offices are continually looking for ways to make their lives easier to manage the day-to-day activities and ensure the right compliance / controls are in place when running a family office. Bill pay is one of those areas that becomes more time consuming and complex as the family office grows. During this session, you will learn about:
- Key technology trends & insights
 - How technology needs and expectations are changing and how family offices can take advantage of this
- KEVIN AU** • Head of Product Marketing, Wealth Management, **Bill.com**
- 12:30PM** **NETWORKING SESSION**
Randomly assigned small group networking session — admittance until 12:35pm. If late, please do not join the room and wait until the next session.
- 1:15PM** **BREAK**
- 2:30PM** **IMPACT, CLIMATE CHANGE AND THE FUTURE OF INVESTING**
- 3:00PM** **NETWORKING SESSION**
Randomly assigned small group networking session — admittance until 3:05pm. If late, please do not join the room and wait until the next session.
- 3:45PM** **CRYPTO: THE NEXT PHASE OF THE DIGITAL ECONOMY**
Over the last 30 years, the internet has completely reshaped how the world functions, giving rise to the digital economy. In last six months, crypto-networks have gone mainstream as large corporations add Bitcoin to their corporate treasuries and consumers spend hundreds of millions of dollars on Digital Artwork and Collectibles. The rise of Bitcoin, Non Fungible Tokens, and Decentralized Finance represents the next phase of the Digital Economy. This session will feature an expert sharing his view on the implications for next phases of the Digital Economy.
JAMES HUTCHINS • Co-Founder & Managing Partner, North Island Ventures (Son of Glenn Hutchins)
- 4:30PM** **END-OF-DAY SPEED NETWORKING**
During this interactive networking session, you will be given a chance to speed meet five community members during short meetings. You will randomly be placed with one other member for four minutes to chat and exchange business cards/contact details. This process will be repeated five times.

PROGRAM DAY THREE

Thursday, April 15th, 2021

(Times shown in EST)

11:00AM **WELCOME**

BRIEN BIONDI • CEO, Campden Wealth, Americas & Institute for Private Investors

11:05AM **CHAIRMAN'S OPENING REMARKS**

R. TODD RUPPERT • Founder, Ruppert International, Venture Partner, Greenspring Associates, retired CEO, T. Rowe Price Global, Board Member, INSEAD Business School, Rock & Roll Hall of Fame, & Others

11:10AM **5 PRINCIPLES TO MAKE IT FUNOMENAL**

While children today are growing up with tablets, what will change in the next 20+ years? Chief Wagon Officer, Robert Pasin, shares how he led the reinvention of Radio Flyer and how his creative & committed team transformed the iconic brand from failing to “FUNomenal”.

ROBERT PASIN • Owner & Chief Wagon Officer, Radio Flyer Inc.

12:00PM **HOW IS TODAY'S WORLD PLANNING FOR TOMORROW'S PANDEMIC?**

12:30PM **NETWORKING SESSION**

Randomly assigned small group networking session — admittance until 12:35pm.
If late, please do not join the room and wait until the next session.

2:00PM **CLOSING KEYNOTE CONVERSATION WITH JODI BERG OF VITAMIX**

While fad diets often wane in popularity, we can't say the same goes for this family business. Vita-Mix has led the consumer kitchen electronics industry for over half a century with their superior blending products known for grinding everything from coffee beans, soup, and even grain into flour. CEO, Jodi Berg will offer insight into how they've adapted with consumer demands while maintaining a high-caliber product over the years.

JODI BERG • President & Chief Executive Officer, Vita-Mix Corporation

In conversation with: **DANIEL GOLDSTEIN** • CEO & President, Folience

3:00PM **CLOSE OF MEETING**

BRIEN BIONDI • CEO, Campden Wealth, Americas & Institute for Private Investors

Corporate Partners



Campden Wealth

Membership | Events | Research | Education | IPI

P.O. Box 7022 • New York, NY 10008

Tel: 212 693 1300 • Fax: 212 693 2797

Email: ipi@campdenwealth.com

www.campdenevents.com