

FAMILY OFFICE SUMMIT

2024 AGENDA



INVITATION
ONLY. APPLY
TO ATTEND:
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ONE PLANET  ONE MISSION

Earthx2024
CONGRESS OF CONFERENCES

APRIL 25, 2024

Earthx2024

CONGRESS OF CONFERENCES

FAMILY OFFICE SUMMIT

HILTON ANATOLE | DALLAS, TX

As part of Earthx2024's Congress of Conferences, the Family Office Summit is an inaugural invitation-only, intimate gathering for family office principals, high-net worth individuals, and family foundations interested in exploring investment and philanthropic opportunities in environmental sustainability and conservation.

This will be a unique summit for peer-to-peer learning and best practices from family office principals who are leading industry and investment professionals. This will also be a highly valuable event for family principals who are either heavily engaged in environmental sustainability and conservation-related investments and philanthropy or other family office principals that are looking to interact with peers in order to learn more about the potential opportunity, industry trends, and lessons learned.

SESSIONS AND SPEAKERS ARE SUBJECT TO CHANGE

AGENDA SCHEDULE

WEDNESDAY, APRIL 24

HILTON ANATOLE TOPAZ ROOM

7:30 pm Welcome Dinner

THURSDAY, APRIL 25

FUNDAMENTALS OF FAMILY OFFICES WORKSHOP

WEDGWOOD BALLROOM

9 am Welcome Address

Vikram Agrawal - Managing Director, Personal Family Office of Trammell S. Crow

9:10 am Creating the Foundation for Long-term Family Office Success

Rus Miller - Managing Director, KFO LLC

9:25 am Family Office Governance Led by Advisors and Directors

Jim Hayden - Founder, Board Developer

9:40 am The Ongoing Evolution of Philanthropy

David Cary - Founder, Cary Impact Advisors

9:55 am Navigating Family in a Family Enterprise

Joshua Gentine - Founder, Bench Consulting and Family.Inc (Sargento Foods Inc. Owner & Board Member)

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**10:10 am Protecting your Family in the Digital Age:
Cybersecurity & Technology Platforms**

Ray Dinunzio - Partner, TOS Advisors

**10:25 am Macroeconomic Markets Update Impact on
Your Portfolio**

Mason King - Principal, Portfolio Management,
Luther King Capital Management

10:40 am BREAK

WHY FAMILIES SHOULD CARE ABOUT THE ENVIRONMENT

WEDGWOOD BALLROOM

11 am Welcome Discussion

Trammell S. Crow - Founder, EarthX

**11:10 am Honoring Legacy & Importance of
Regenerative Agriculture**

Laura Turner Seydel - Director, Turner Foundation

James Clement III - SVP & GM - Grass and
Rangeland, EarthOptics

**11:35 am Environmental Conservation is a Family
Affair: Perspectives from a Texas Power
Couple**

Jacki Deason - Host, The Jacki Daily Show

Doug Deason - President, The Deason Foundation
& Deason Capital Services

12 pm Networking Luncheon

**1:10 pm Working on Democracy & Political
Influence is Essential for Dramatic Climate
Change Advancements**

Kent Thiry - Former CEO, DaVita Health

Bill Shireman - Chairman, In This Together

**1:35 pm Bridging the Ideological Divide Through
the Blue Marble**

Jay Faison - Founder, ClearPath

James D. Gollin - Director, Angelica Foundation

**2 pm Why Investing in Sustainability Innovation
in Underrepresented Markets is Critical**

Van Jones - Investor, American News and Political
Commentator

Nathaniel Harding - Managing Partner, Cortado
Ventures

**2:25 pm The Investment and Social Impact
Opportunity with the Sustainability
Transition**

George Wight - Managing General Partner, Legacy
Exchange

Billy Zane - Founder and CEO, The Convergence
Lab & General Partner, Legacy Exchange

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5 pm Networking Reception

7 pm Banquet

2:50 pm BREAK

3:20 pm **New Models to Drive Corporation Innovation**

Joe D'Cruz - Co-Founder, Catalyze Partners

Tricia D'Cruz - Co-Founder, Catalyze Partners

3:45 pm **Untapped Opportunity: Investing in Land and Natural Resources**

Kyle Bass - Founder and Chief Executive Officer, Conservation Equity Management

Vikram Agrawal - Managing Director, Personal Family Office of Trammell S. Crow

4:10 pm **Why Environmental Philanthropy is Important**

Lexi Bowes-Lyon - Creative and Philanthropic Director, Space for Giants

Kevin Dahlberg - Managing Director at 3CR-Riverbend Capital Advisors

4:35 pm **Capstone Discussion: Why Sustainability is Critical for Island Resilience**

Hon. Prime Minister Siaosi 'Ofakivahafolau Sovaleni - Kingdom of Tonga

Sergio Fernandez de Cordova - Chairman, PVBLC Foundation & Member, Fernandez de Cordova Family Office

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SPEAKERS

Bill Shireman - Chairman, In This Together

Billy Zane - Founder and CEO, The Convergence Lab & General Partner, Legacy Exchange

David Cary - Cary Impact Advisors

Doug Deason - President, The Deason Foundation & Deason Capital Services

George Wight - Managing General Partner, Legacy Exchange

Jacki Deason - Host, The Jacki Daily Show

James D. Gollin - Director, Angelica Foundation

James Clement III - SVP & GM - Grass and Rangeland, EarthOptics

Jay Faison - Founder, ClearPath

Jim Hayden - Founder, Board Developer

Joe D'Cruz - Co-Founder, Catalyze Partners

Joshua Gentine - President, Bench Consulting

Kent Thiry - Former CEO, DaVita Health

Kevin Dahlberg - Managing Director at 3CR-Riverbend Capital Advisors

Kyle Bass - Founder and Chief Executive Officer, Conservation Equity Management

Laura Turner Seydel - Director, Turner Foundation

Lexi Bowes-Lyon - Creative and Philanthropic Director, Space for Giants

Mason King - Principal, Portfolio Management, Luther King Capital Management

Nathaniel Harding - Managing Partner, Cortado Ventures

Ray Dinunzio - CIMA, TOS Advisors

Rus Miller - Managing Director, KFO LLC

Hon. Prime Minister Siaosi 'Ofakivahafolau Sovaleni - Kingdom of Tonga

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