

FAMILY OFFICE SUMMIT 2025 AGENDA



INVITATION
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ONE PLANET ✨ ONE MISSION

Earthx2025
CONGRESS OF CONFERENCES

APRIL 24, 2025

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2ND ANNUAL FAMILY OFFICE SUMMIT HILTON ANATOLE | DALLAS, TX

As part of Earthx2025's Congress of Conferences, the 2nd Annual Family Office Summit is an 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 TUESDAY, APRIL 22

7 pm **Family Office Summit Principals
Welcome Dinner**

THURSDAY, APRIL 24

7:30 am **Networking Breakfast**

8:30 am **En-ROADS Presentation**

Michael Sonnenfeldt - Entrepreneur
& Philanthropist, Chairman and Founder of Tiger21,
Chairman of MUUS & Co

John D. Sterman - Jay W. Forrester Professor of
Management, MIT Sloan School of Management

WHY FAMILIES SHOULD CARE ABOUT THE ENVIRONMENT

9 am **Welcome Discussion**

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

9:05 am **Current Implications on Conservation & the
Environment Given the Current US Political
Environment Environmental**

Michael Sonnenfeldt - Entrepreneur
& Philanthropist, Chairman and Founder of Tiger21,
Chairman of MUUS & Co

Bill Shireman - President, Future500 & CEO,
Solution Citizen

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9:30 am Global & National Security Update & Potential Environmental Implications

Christopher Miller - Former Acting Secretary of Defense, United States Government

Joe D'Cruz - Co-Founder and Managing Director, Catalyze Partners

9:55 am Why Investing in Local and Regional Parks Drives Growth & Environmental Awareness

Mary Owen - Chair, Ralph C. Wilson, Jr. Foundation

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

10:20 am Navigating a Cycle: Lessons Learned as a Technology Investor & Leader

Jack Selby - Managing Director, Thiel Capital

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

10:45 am Networking Break

11:10 am Managing Intergenerational Transfer of Land

Marshall Ayers Bowen - Vice President and General Counsel, Shield Ranch

Jay Kleberg - Executive Director, Gulf Trust

11:35 am Texas Next Gens Leading Sustainability & Conservation

Chelsea Toler - President, Family Foundation & Logictry

Sara Rana - Principal, Rana Family Trust

12 pm Networking Luncheon

1 pm Break

1:30 pm The Power of Both: Philanthropy and Investing for a New Era of Change and Resilience

Lexi Bowes-Lyon - Global Philanthropy Director, Space for Giants

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

1:55 pm European Perspectives: How to Drive Value from Your Farm and Ranch

HIRH Archduke Sandor Habsburg-Lothringen - Founder, Archduke of Austria, Prince of Tuscany, Krown Impact

Jacob Uhlenkott - Global Strategic Development, Krown Impact

2:20 pm Investing with Your Values: A Hands-on Approach to Sustainable Impact

Senofer Mendoza - Co-Founder, Mendoza Impact & Ventures

Adrian Mendoza - Co-Founder, Mendoza Impact & Ventures

2:45 pm US-Mexico Transnational Border Sustainability Investment Opportunities

Pablo Eichelmann - CIO, Benjamin Salinas Family Office

Gerald Schwebel - EVP Corporate International Division, Shareholder, IBC Bank

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**3:10 pm Capstone Session: Family Office Principals
Dual Responsibilities as Industry,
Investment, Philanthropic, and Public
Service Leaders**

Cornelius Shields - Founder & CEO, KORE
Infrastructure

Lord Fatafehi Fakafanua - Speaker of Parliament,
Co-Chairman, Kingdom of Tonga, Island Resilience
Partnership

Matt Tranchin - Chairman, Global Resilience
Partners

3:35 pm Networking Break

FUNDAMENTALS OF FAMILY OFFICES WORKSHOP

**4 pm How to Find the People that Don't Want
Your Money**

Jim Hayden - Board Developer

**4:30 pm Leveraging DAFs & Other Philanthropic
Vehicles to Drive Environmental Impact**

Rick Davis - Co-Founder & Managing Partner,
LOHAS

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

5 pm Networking Reception

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CONFIRMED SPEAKERS



ADRIAN MENDOZA
Co-Founder, Mendoza
Impact & Ventures



BILL SHIREMAN
President, Future500
CEO, Solution Citizen



CHELSEA TOLER
President, Family
Foundation & Logictry



CHRISTOPHER MILLER
Former Acting Secretary
of Defense,
United States Government



CORNELIUS SHIELDS
Founder & CEO, KORE
Infrastructure



**LORD FATAFEHI
FAKAFANUA**
Speaker of Parliament,
Co-Chairman, Kingdom of Tonga,
Island Resilience Partnership



GERALD SCHWEBEL
EVP Corporate
International Division,
Shareholder, IBC Bank



JACK SELBY
Managing Director,
Thiel Capital



JACOB UHLENKOTT
Global Strategic
Development,
Krown Impact



JAY KLEBERG
Executive Director
Gulf Trust



JIM HAYDEN
Board Developer



JOE D'CRUZ
Co-Founder and
Managing Director,
Catalyze Partners



LEXI BOWES-LYON
Global Philanthropy
Director, Space for Giants



**MARSHALL AYERS
BOWEN**
Vice President and
General Counsel,
Shield Ranch



MARY OWEN
Chair,
Ralph C. Wilson, Jr.
Foundation

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CONFIRMED SPEAKERS



MATT TRANCHIN
Chairman, Global
Resilience Partners



MICHAEL SONNENFELDT
Entrepreneur & Philanthropist,
Chairman and Founder of
Tiger21, Chairman of MUUS & Co



PABLO EICHELMANN
CIO, Benjamin Salinas
Family Office



RICK DAVIS
Co-Founder & Managing
Partners, LOHAS



**HIRH ARCHDUKE
SANDOR HABSBURG-
LOTHRINGEN**
Founder, Archduke of
Austria, Prince of Tuscany,
Krown Impact



SARA RANA
Principal
Rana Family Trust



SENOFER MENDOZA
Co-Founder
Mendoza Impact &
Ventures

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