

Day 1 – Wednesday, October 15

8:00 – 9:00 AM	Breakfast, Registration & Networking		
9:00 – 9:30 AM	Opening Remarks		Speaker: Jennifer Katrulya, Founder & CEO, Kajora Global Family Network
9:30 – 10:00 AM	Industrial CRE: Demand, Strategy & the Next Era of Growth	Once the quiet engine of the CRE market, industrial real estate is now a primary focus for institutional capital and global investors. This session explores how strategies are shifting in response to rising interest rates, supply chain recalibration, and surging demand for logistics, infrastructure, and last-mile assets. Discover why industrial is no longer the quiet workhorse of CRE—and how the smartest capital is rewriting its rulebook in real time.	Speaker: John Alascio, Vice Chairman, Cushman & Wakefield
10:00 – 10:30 AM	Beyond the Balance Sheet: Tax-Aware Strategies for Commercial Real Estate & Multi-Generational Wealth	This fireside chat explores the intersection of commercial real estate, tax strategy, and long-term wealth preservation. The discussion will uncover how innovative, tax-aware approaches can unlock hidden value in real estate investments, optimize after-tax returns, and provide a blueprint for stewarding wealth across generations. Attendees will gain actionable insights into structuring deals, mitigating tax drag, and aligning investment strategies with both legacy and liquidity goals—leaving with practical frameworks to apply immediately in their businesses, portfolios, and family planning.	Speaker: MaryAnne Gilmartin, Founder & CEO, MAG Partners Speaker: Jared Siegel, Co-Founder & CIO, Delap Wealth Advisory
10:30 – 10:50 AM	The Hedge Fund Narrative: Access, Alignment & the Road Ahead	Hedge funds operate at the crossroads of capital, regulation, and reputation. This session explores how the industry is evolving in response to family office expectations, policy shifts, and growing demand for transparency and alignment. With decades of experience advocating for the hedge fund community and shaping its public image, you'll hear a candid view of how hedge funds can better engage with family offices, navigate regulatory challenges, and reposition themselves for long-term relevance in a rapidly changing investment landscape.	Speaker: Mitch Ackles, President, Hedge Fund Association Moderator: Jeremy Smith, Co-Founder & CEO, pega6
10:50 – 11:10 AM	Fireside Chat with Ryan Ansin	The New Price of Admission: Leading with Impact in a Transparent World In a world where purpose, visibility, and authenticity collide, <i>"The New Price of Admission"</i> challenges today's leaders and investors to rethink what it means to belong, build, and contribute. Ryan Ansin explores the intersection of personal values, social accountability, and capital influence—inviting us to decide how we want to show up in an era where every decision is amplified. From reimagining angel investing to redefining leadership presence, Ryan shares how tiny contributions can lead to giant change when guided by intention and courage.	Speaker: Ryan Ansin, Founder, FatherForm Entrepreneur Investor
11:10 – 11:30 PM	From Resilience to Readiness: Education & Career Pathways for the Next Generation	Education is being redefined. What once depended on perseverance alone is now being reshaped into scalable, accessible pathways that connect classrooms to careers. This session explores how innovative school models and career accelerators are challenging traditional systems—opening doors to high-demand	Speaker: Jeremy Smith, Co-Founder & CEO, pega6

		industries, creating adaptive and personalized learning, and ensuring that the next generation is equipped not just with resilience, but with real opportunity. Attendees will gain both inspiration and practical insights into how education, workforce training, and alternate learning models are transforming futures from grade school through university and beyond.	
11:30 – 12:00 AM	Voices Across Generations: AI as a Bridge Between Past, Present & Future	In a world racing forward with AI and innovation, the things we most want to hold onto—voice, stories, character—often slip away. Reflekta offers a new way of preserving legacy, not as something locked away, but as something alive. This session explores how technology can be used to capture the essence of who people are, so their presence—and wisdom—can continue to shape family, influence values, and connect generations long after we're gone. We'll dig into what's possible when memory meets AI, ethical boundaries that matter, and how keeping stories present can be one of the most powerful investments of all.	Speaker: Miles Spencer, CEO, Reflekta Speaker: Joshua Gentine, Founder & President, Bench Board of Directors, Sargento Foods, Inc.
12:00 – 1:30 PM	Lunch and Networking		
1:30 – 1:45 PM	Women in Capital Council: A Collaborative Launch by Chai Ventures & Kajora Global Family Network	This session marks the official launch of the Women in Capital Council, a joint initiative by Chai Ventures and Kajora Global Family Network. The Council brings together women and allies across venture capital, family offices, and institutional finance to expand access, accelerate visibility, and amplify the impact of women in capital markets. In this conversation, the founders will share the shared mission behind the partnership, outline upcoming programs and opportunities for engagement, and discuss how collaboration between capital leaders can shape a more inclusive and innovative financial future.	Speaker: Rajiv Kapoor, Founder & CEO, Chai Ventures Speaker: Jennifer Katrulya, Founder & CEO, Kajora Global Family Network
1:45 – 2:15 PM	Leadership, Longevity, and Innovation - A New Chapter and Playbook for Modern Family Offices	The Vanderbilt family story offers one of the most recognizable examples of how legacy, wealth, and influence can endure across generations — and the challenges that come with it. In this session, Consuelo Vanderbilt Costin shares insights from her family's journey and her own experience as a founder and innovator, paired with best practices for modern family offices. Some of the topics we'll cover include: • Governance and • NextGen Leadership • Cybersecurity and personal protection • Reputation management • Philanthropy This conversation will highlight the structures and values that help families preserve influence while adapting to a rapidly changing world.	Speaker: Consuelo Vanderbilt, CEO, SohoMuse 7th Generation leader, Multi-brand Entrepreneur, Recording Artist, Investor Speaker: R. Adam Smith, Founder & CEO, RAS Capital Partners Global Family Office Expert Investor Speaker Author Moderator: Jennifer Katrulya, Founder & CEO, Kajora Global Family Network
2:15 – 2:40 PM	What's Next for Alternatives: Navigating Strategy, Scale & Shifting Markets	Alternatives have moved from niche to necessary—but what comes next? This fireside chat dives into how decades of experience in law, tax, and investment strategy inform today's alternative landscape. Expect candid insights on scaling investment platforms, navigating volatility, and uncovering where future opportunities will emerge. The discussion will push beyond conventional wisdom to challenge assumptions and equip investors with sharper frameworks for thriving in an era of rapid change.	Moderator: Marcia Nelson, Managing Director, Freedom Capital Markets Speaker: Martin J. Gross, Founder & President, Sandalwood Securities

2:40 - 3:15 PM	Bridging Family Legacy with Modern Wealth Strategy: A Female Principal's Perspective on Leadership, Mentorship, and Breaking Barriers	As a fourth-generation owner of JE Dunn Construction and a Principal at Mariner Wealth Advisors, Katie Dunn brings a unique vantage point to the intersection of family business, institutional wealth management, and personal leadership. In this session, she will share how she bridges legacy and innovation—navigating the responsibilities of generational ownership while guiding families and entrepreneurs in building sustainable, forward-looking wealth strategies. Katie will also open up about her journey as a leader, offering candid insights on mentorship, networking, and how to break through traditional norms while staying true to core values.	Speaker: Jennifer Katrulya, Founder & CEO, Kajora Global Family Network Speaker: Katie Dunn, Principal and Senior Wealth Consultant, Mariner Owner, JE Dunn Construction Company (Fourth-Generation)
3:15 - 4:00 PM	The 150MM+ Views Challenge: Building Reach Across Real Estate, Technology, Capital, Brands & Innovation	We'll close the day with a high-energy, interactive discussion designed to explore how attention can be converted into influence and, ultimately, capital. Grant will share how his own journey—from building an online audience of more than 16 million (and an estimate 150MM+ audience) to growing a multi-billion-dollar real estate portfolio—illustrates ways visibility can be leveraged to attract opportunities, scale growth, and expand reach. The insights extend well beyond real estate, offering a framework for thinking about how media, marketing, and sales can support personal and family brand building, as well as growth in emerging technologies, digital assets, and other sectors where online influence matters.	Speaker: Grant Cardone, Founder & CEO, Cardone Capital Cardone Training Technologies Moderator: Sabrina Cardone, Entrepreneur Investor Rising Leader at Cardone Capital
4:00 - 4:15 PM	Special Announcements and Closing Remarks		Speaker: Immpana Srri, Chief Investment Officer: Investment Strategy (Private Markets), Koherent, Inc. Speaker: Jennifer Katrulya, Founder & CEO, Kajora Global Family Network
4:15 - 5:00 PM	Cocktail Reception Sponsored by Asseta		
5:00pm	Private Dinner (By Invitation Only and Diamond-Level Guests)		

Day 2 – Thursday, October 16

8:00 – 9:00 AM	Breakfast, Registration & Networking		
8:15 – 8:45 AM	Marketing and Sales Mastery Masterclass with Grant Cardone	In this high-energy, hands-on workshop, Grant Cardone distills the proven frameworks behind his global sales empire—offering a playbook that every business leader, founder, and family office professional can immediately apply. From mastering follow-up and negotiation to understanding how attention converts into opportunity, this session focuses on practical, repeatable systems for scaling revenue and influence. Expect audience interaction, live strategy examples, and real-world tactics that bridge the gap between visibility and execution.	
9:00 – 9:15 AM	Opening Remarks - Setting the Stage for Capital's Next Chapter		Speaker: Jennifer Katrulya, Founder & CEO, Kajora Global Family Network
9:15 – 9:45 AM	Digital Assets & Institutional Access: The Next Chapter in Capital Markets	Digital assets are moving from the periphery of finance into the institutional mainstream. In this session, we'll explore how new vehicles—from tokenized treasuries to digital asset ETFs—are creating scalable, compliant access points for allocators. Anthony Bassili, Head of Coinbase Global Asset Management, will discuss how institutional-grade infrastructure is shaping the next era of capital markets, what family offices and RIAs should know about evolving products, and how digital assets are converging with traditional investment frameworks.	Speaker: Anthony Bassili, President, Coinbase Asset Management
9:45 – 10:15 AM	Collateralization in the New Economy: Digital Assets, Risk, and Institutional Adoption	As tokenized assets, stablecoins, and digital securities enter mainstream finance, institutions are rethinking how collateral is defined, risk-rated, and deployed. This session—led by Société Générale and Moody's—will explore how traditional credit frameworks are evolving to meet the demands of digital markets, including the impact on settlement, liquidity, and regulatory oversight. From stablecoins to tokenized bonds, we'll examine how collateralization is being reengineered for the next era of capital markets—and what institutional players need to know now.	Speaker: Charles-Antoine Michallet, Director, Digital Assets Structuring, Société Générale Speaker: Rajeev Bamra, Head of Strategy, Digital Economy at Moody's Ratings Moderator: Jennifer Katrulya, Founder & CEO, Kajora Global Family Network
10:15 – 11:00 AM	Culture, Commerce & Code: Reimagining Transformational Ecosystems	This panel convenes thought leaders from policy, creative commerce, enterprise transformation, and operational integration to explore how the future of inclusive growth is being built. The conversation will unpack how cultural innovation, strategic infrastructure, and execution discipline must align to scale resilient, mission-driven ecosystems that merge capital with purpose.	Moderator: Jennifer Katrulya, CEO, Kajora Global Family Network Speaker: Greg Merrill, CEO, Futura Fragua Former Global Head of Digital Transformation, Nike Speaker: Devin Gilmartin, Founder & CEO, The Canvas Global Speaker: Ed Maguire, Senior Managing Director, Director of Research, Freedom Capital Markets
11:00 – 11:30 AM	Next-Gen Investing: How Family Offices Are	Family offices are increasingly turning to middle market private equity as a core strategy for generating outsized returns and accessing differentiated deal flow.	Speaker: Vikash Magdani, Partner, Bharat Capital Partners

	Using AI to Source and Invest in Middle Market Private Equity	This panel dives into how forward-thinking family offices are leveraging artificial intelligence to uncover off-market opportunities, accelerate deal sourcing, and enhance diligence in an increasingly competitive landscape. Hear from investors and technologists at the forefront of AI adoption as they discuss practical use cases, strategic advantages, and the future of tech-enabled private investing. A must-attend for anyone looking to stay ahead in middle market dealmaking.	Speaker: John Nives, Co-Founder, MMPC.AI / GoldilocksAI
11:30 – 12:00 PM	Building the Next-Gen Family Office Platform: Bridging Traditional and Digital Capital Markets	Family offices are at the center of one of the most important capital shifts of our time—balancing legacy allocations in equities, credit, and private markets with emerging opportunities in digital assets, tokenization, and new yield strategies. Abra Capital is building a platform designed to meet this moment. In this session, leaders from Abra Capital will explore how family offices can access institutional-grade strategies in both traditional and digital markets, supported by robust custody, reporting, and governance frameworks. The conversation will highlight practical steps for family offices to modernize their investment platforms, mitigate risks, and capture opportunities in a rapidly evolving landscape.	Speaker: Bill Barhydt, CEO, Abra Speaker: Marissa Kim, Head of Asset Management
12:00 – 1:30 PM	Networking Lunch		
1:30 – 2:00 PM	Strategy Talk with Michael Saylor: Conviction, Capital, and Code: Building Enduring Wealth in a Digital Age	Michael Saylor has built and rebuilt through cycles of innovation, conviction, and volatility. In this keynote, he draws from decades at the intersection of technology and finance to challenge leaders to think bigger about digital transformation, corporate strategy, and personal conviction. This is a rare opportunity to hear one of the world's boldest strategic thinkers discuss the frameworks that define enduring success in the 21st century.	Speaker: Michael Saylor, Executive Chairman, Strategy
2:00 – 2:15 PM	Break		
2:30 – 3:00 PM	Power, Privacy & Purpose: Leading a Family in the Spotlight	When a family's influence reaches across industries, media, and markets, leadership becomes both public and deeply personal. In this rare, multi-generational discussion, Grant, Elena, Sabrina, and Scarlett Cardone share how they've built and stewarded a global capital enterprise while keeping family, values, and vision at the center. Together, they explore what it means to grow an intergenerational brand rooted in entrepreneurship, ownership, and impact—balancing visibility with security, ambition with authenticity, and wealth-building with wisdom. This conversation reveals how the Cardones are shaping a legacy that extends far beyond business, redefining what modern family office leadership looks like in the spotlight.	Moderator: Principal and Senior Wealth Consultant at Mariner Fourth-Generation Owner of JE Dunn Construction Speaker: Grant Cardone, CEO, Cardone Capital Cardone Training Technologies Speaker: Founder, Cardone Mortgage Co-Founder, Grant Cardone Foundation Speaker, Author, Mentor Speaker: Sabrina Cardone, Entrepreneur, Investor, Model, Rising Leader at Cardone Capital Speaker: Scarlett Cardone, Entrepreneur, Investor, Actress, Model, Rising Leader at Cardone Capital
3:00 – 3:45 PM	Innovation in Action: Tools Reshaping Family Offices & Private Capital	This fast-paced showcase highlights some of the most practical innovations transforming how families, funds, and founders manage capital, legacy, and operations. From estate management and cybersecurity to digital assets, social media networking, investing in health & wellness, and next-generation governance, this series	Moderator: Shawn Springs, Founder, The Agena Group 13-year NFL/All-Pro

		spotlights the tools driving the next chapter of private wealth and family office strategy.	Speaker: Jonathan Fishbeck, Founder & CEO, EstateSpace Speaker: Lilli Donahue, Founder, The Prenup Podcast Speaker: Alex Chung, Founding Head of Growth, Goodword Speaker: Tommy Struzzieri, CEO, Alpha Win
3:45 - 4:30 PM	Venture Capital at the Edge: AI, Innovation & the Next Wave of Private Markets	Artificial intelligence is reshaping every industry—and venture capital is at the center of the shift. This session brings together leading investors and innovators to explore how families and funds can participate in the next wave of AI-driven opportunities. From early-stage deal flow to scaling strategies and ecosystem building, panelists will share where they see the most disruptive innovation emerging, how capital is being allocated, and what lessons can be drawn from their own experience at the forefront of AI, fintech, and frontier technologies.	Speaker: Bhaskar (BG) Ghosh, Partner, 8VC Speaker: Sean Koh, Inventor, Proof of Reception (PoR) Chief Executive Officer, KOHERENT INCORPORATED (Family Office) Speaker: David Teten, Partner, OrangeCollective.vc Chairman, ActionTank.io Speaker: Chuck Ng, Co-Chair IEEE AI Investment Summit Co-Founder & Board Member, World Leading Scientists Institute Investor, Databricks Ex-PayPal Ex-JP Morgan Berkeley & INSEAD Moderator: Vishal Verma, Managing Partner, Edgewood Ventures (Family Office) General Partner, Redwood Collective, L.L.C. Chief Curator, Sidebar Summit
4:30 - 5:00 PM	From Room to Relationship: Sales & Marketing Strategies That Resonate with Family Offices	Family offices don't respond to hard pitches — they respond to trust, alignment, and value creation. In this closing session, we'll explore how to translate the conversations and connections from the Summit into meaningful, lasting relationships. Attendees will learn how to refine messaging, position their brand authentically, and design marketing that speaks the language of capital preservation, legacy, and innovation. This session will offer a roadmap for moving from introductions to trust-building, and from content to conversion — without losing the nuance and discretion that family offices require.	Speaker: Jennifer Katrulya, Founder & CEO, Kajora Global Family Network
5:00 - 7:00 PM	Strategy & Scale Soiree - Where brilliant ideas meet bold execution. Sponsored by <u>Asseta</u>	The official reception of the Private Capital & Innovation Summit Tech & Innovation Day – Greenwich brings together visionaries shaping the next era of wealth creation and innovation: Featuring (subject to change): Michael Saylor (Strategy) · Grant Cardone (Cardone Capital) · Jennifer Katrulya (Kajora Global Family Network) Heavy Appetizers and Drinks Provided	