

# World Family Office Forum | Americas

**November 2025**  
The Plaza, New York, USA





# The Event

*The World Family Office Forum | Americas is an exclusive business event, uniting the region's leading business families and single family offices.*

## Overview

The Summit is an essential event for elite family office principals and senior family office leadership from across the Americas, looking to stay ahead in the world of wealth, business, and investments.

Over two days, delegates have the opportunity to:

- Forge valuable connections with like-minded family offices fostering business synergies, co-investments and collaboration.
- Gain insights from your peers navigating the intricacies of investments, and the nuances of regional collaboration.
- Engage with global asset managers, banks and intermediaries to explore unique investment opportunities and strategies.

The Summit is hosted by Connect Group, a world-leading business events organizer renowned for its specialized focus on family office gatherings. Connect Group ensures a fusion of global perspectives and regional expertise at each of our events.

## High-level

The Summit maintains a high-level delegation of family business owners, family office principals and their senior management and investment teams representing single family offices from across Europe.

## Exclusive

A minimum 70% of the event delegation consists of family offices, and a maximum 30% of asset managers and intermediaries, ensuring a highly exclusive, family office led dialogue, and an environment that promotes effective relationship-building between participants.



# Day 1

08:00 - 09:00

## Registration & Light Breakfast

09:00 - 09:10

## Chairman Welcome Remarks

09:10 - 09:50 | Panel Discussion

### The Family Business: Managing Relationship Dynamics, The Rising Generation and Transition

Family businesses are wrought with complexities, from balancing family dynamics with business decisions, integrating the younger generation into leadership roles, effective governance, and the challenges of preserving the family's core values and reputation in a modern market. This discussion will aim to address these issues and explore the role of family businesses in supporting social causes, sustainability, and community development.

09:50 - 10:10 | Fireside Chat

### Next Generation Empowerment

The story of a next-gen leader and his creation of influential networks and novel strategies for future-focused leadership.

10:10 - 10:30 | Keynote Presentation

### Prosperity & Responsibility

This presentation offers a holistic approach to understanding and managing the complexities of prosperity in today's world.

10:30 - 11:10 | Panel Discussion

### Constructing a Family Office Portfolio: Trends and Investment Strategies to Consider During Turbulent Times

As global markets face heightened volatility from shifting macroeconomic and geopolitical trends, family offices must rethink their investment strategies. This session explores strategies for building resilient portfolios with a focus on portfolio diversification, rebalancing, alternative investments and risk.

11:10 - 11:30

## Networking Break / One-To-One Meetings

11:30 - 12:30

## Roundtable Discussions

**Table 1:** Harnessing Mid-Market Potential: Private Equity Insights for Family Offices

**Table 2:** Unlocking Opportunities in Private Debt: Strategies, Risks, and Innovations

12:30 - 14:00

## Networking Lunch

14:00 - 14:40 | Panel Discussion

### Family Office Venture Investing

This panel explores strategies for family offices in venture capital, comparing direct/co-investing with fund investments. It covers how to access top deal-flow, compete in a rapidly growing startup ecosystem, and identifies key sectors to watch, such as AI, healthtech, fintech, and sustainable energy, for long-term investment opportunities.

14:40 - 15:00 | Keynote Presentation

### Technology & Innovation: Investing at the Cutting Edge

15:00 - 15:20 | Keynote Presentation

### The Future of Healthcare: A GP Perspective

15:20 - 15:40 | Keynote Presentation

### Public Markets as a Cornerstone of a Family Portfolio

15:40 - 16:00

## Networking Break / One-To-One Meetings

16:00 - 16:40 | Panel Discussion

### Digital Assets & Beyond

Digital assets are gaining momentum among family offices, signalling a transformative shift in wealth management. This discussion will examine the evolving cryptocurrency markets and how Web3 technologies are integrating with traditional finance and what this means for family office investors.

16:40 - 17:20 | Panel Discussion

### Beyond Giving: Innovating Philanthropy in the 21st Century

How do we align philanthropic efforts with family values, utilize collaborative giving, understand innovative funding models, and engage the next generation? This panel seeks to answer these questions, offering practical insights for effective philanthropy.

17:20 - 17:40 | Keynote Presentation

### SoleFamily: Providing Hope and Creating Smiles in Bali

19:00 - 22:00

## Networking Cocktail Reception & Gala Dinner at Saint June Restaurant, with Special Entertainment

Experience relaxed luxury at this oceanfront restaurant, featuring an elegant South American-inspired menu.

# Day 2

08:00 - 09:00

## Networking Breakfast

09:00 - 09:40 | Panel Discussion

## Making Sense of Impact Investing

Impact investing is reshaping family office priorities, guided by a new generation focused on social and environmental change. This discussion will address the growth drivers of impact investing, strategies for targeting investments with sustainable outcomes, and methods for measuring their societal and environmental impact. Additionally, it will examine tactics for fostering collaboration to amplify impact, providing a roadmap for those looking to make a difference through their investments.

09:40 - 10:00 | Keynote Presentation

## The Future of Food

Gain insights from a leading US impact fund on how addressing the global food challenge depends on sustainable methods, cutting-edge technologies, and smart investment.

10:00 - 10:20 | Keynote Presentation

## Beyond Borders: Unlocking Opportunities in Frontier Markets for Long-Term Social Good

Gain insights from a leading European impact fund on how addressing the global food challenge depends on sustainable methods, cutting-edge technologies, and smart investment.

10:20 - 11:00

## Networking Break / One-To-One Meetings

11:00 - 11:40 | Panel Discussion

## Transforming Real Estate for Tomorrow's Investor - A Deep Dive into Emerging Trends and Opportunities

Real estate is evolving rapidly to meet the demands of tomorrow's investor, influenced by changing lifestyles and consumer behaviours. This discussion will explore how these shifts are impacting commercial, retail, and residential real estate markets and what it means for investors. The panel will look into the growing focus on sustainability, green buildings, and the role of proptech in revolutionizing the industry. Looking ahead, the panelists will share their perspectives on the future of the real estate market over the next decade, offering a comprehensive overview of emerging trends and opportunities.

11:40 - 12:00 | Keynote Presentation

## Smart Investing: Optimizing Investment Operations with Family Office Software

12:00 - 12:10

## Closing Thoughts from the Summit Chair

The Summit Chair looks back on the discussions of the two days sharing his key takeaways.

12:10 - 14:00

## Networking Lunch

Enjoy the networking lunch at Saint June Restaurant.

# Let's Connect

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