



PRESERVING
LEGACY,
PROMOTING
PROSPERITY



fort.global
swfi.com
swfinstitute.org

TO DOWNLOAD DIGITAL VERSION OF THIS
COFFEE TABLE BOOK, SCAN QR CODE



DISCLAIMER

The information provided in this coffee table book is for general and informational purposes only. While every effort has been made to ensure the accuracy and completeness of the information, we make no representations or warranties of any kind, expressed or implied, about the suitability, reliability, availability, or accuracy of the information contained within.

The views and opinions expressed in this book are of the individual author and contributors and do not necessarily reflect the official policy or position of the publisher. The publisher and authors disclaim any errors or omissions in the content.

The information in this coffee table book is subject to change without notice. The content may include historical facts, anecdotes, personal experiences, and interpretations that may not be universally accepted. Readers are encouraged to independently verify any provided information and use their judgment when interpreting the content.

The book may contain images, photographs, or illustrations used only for illustrative purposes. Any resemblance to an actual person, living or dead, or actual events is purely coincidental.

The publisher and authors are not responsible for any direct, indirect, incidental, or consequential damages or losses arising from the use of this book or any information contained therein.

Readers should be aware that the content may include cultural, social, or historical references that may be sensitive or offensive to some individuals or groups. The publisher and authors do not endorse or promote any form of discrimination, bias, or harm towards any individual or group.

By reading and using this coffee table book you acknowledge and agree to the terms of this disclaimer.

In addition, please note that all the content, materials, and intellectual property presented at FORT North America 2023, are subject to copyright and proprietary rights held by Sovereign Wealth Fund Institute. Any reproduction, distribution, or unauthorized use of the conference materials, including printing and dissemination, without prior written permission from SWFI, is strictly prohibited.



PRESENTS



FORT North America is the largest gathering on wealth and finance, hosted by SWFI in the financial capital of Texas, at the Dallas Cowboys Headquarters.

Family Office Round Table (FORT) Global is an international thought leadership and convergence platform by the Sovereign Wealth Fund Institute (SWFI®) that is driven by the purpose of protecting generational wealth, preserving legacies, and promoting prosperity for the good, better, and the right.



FORT NORTH AMERICA 2023
DALLAS, TEXAS



GLOBAL WEALTH CONFERENCE 2023
LONDON



FORT NORTH AMERICA OCTOBER 2024
DALLAS, TEXAS

FAMILY OFFICE ROUND TABLE APRIL 2024
RIYADH, SAUDI ARABIA

SWF SUMMIT OCTOBER 2024
BRAZIL

FORT MONACO JUNE 2024

GLOBAL WEALTH CONFERENCE MAY 2024
LONDON, UK

FAMILY OFFICE ROUND TABLE APAC SEPTEMBER 2024
SHANGHAI, PRC

IN GRATITUDE

NAVIGATING THE NEXUS OF STEWARDSHIP AND GLOBAL SYNERGY GOOD FELLOW AWARDS

Dear Pioneers and Protectors of Legacy,

I'm truly elated to announce that the FORT Global North America gathering at The Star, Dallas, Texas was nothing short of extraordinary. As Chairman of the Sovereign Wealth Fund Institute (SWFI), reflecting on this monumental gathering fills me with great satisfaction.

As I draft this foreword, my heart is buoyed by the thought of our shared mission and the transformative paths we have begun paving. The energy, innovation, and collaboration witnessed were immensely amplified by the enthusiastic participation of global visionaries and stalwarts, like yourself.

The coffee table book you now hold is not merely a compilation of moments. It stands as a testament to the discussions, ideas, and visions that came to life during our time together at The Star. Amidst this global tapestry, new ideas were born, and enduring partnerships were solidified.

Over the span of two eventful days, the venue became a melting pot of diversified thoughts and innovative strategies. With influencers from around the globe, the grandeur of our assembly was further accentuated as the resounding harmony of a colossal \$11 Trillion USD AUM hall marked the event's unparalleled success.

Central to our gathering was the GOOD FELLOW Awards. These awards are more than accolades; they symbolize our collective responsibility, urging us to continually strive for excellence and impactful leadership. Our role transcends the mere accumulation of wealth. It challenges us to craft a legacy that can inspire change and engender a meaningful difference. The essence of the GOOD FELLOW Awards, a highlight of our summit, epitomizes this belief, aligning global efforts with principles of integrity, commitment, and service.

As you journey through this book, revisiting the insights and reflections from the awards and associated discussions, let them serve as guiding signposts, inspiring our collective efforts for the days ahead. This book is dedicated to you, the visionaries who understand the profound implications of global leadership and actively work towards them. Let it be a beacon, reminding us of our shared commitment to ensure that our influence serves the greater good.

With heartfelt gratitude for your contributions and an enduring respect for our shared journey, I present this compilation to you. May it always serve as a touchstone of our shared past and an inspiration for our collective future.

In unity and with great respect,

LAKSHMI NARAYANAN

CHAIRMAN,
SOVEREIGN WEALTH FUND INSTITUTE (SWFI)



IN GRATITUDE

PRESIDENT, SOVEREIGN WEALTH FUND INSTITUTE (SWFI)

Dear Distinguished Delegates,

The Sovereign Wealth Fund Institute (SWFI®) and our partners would like to thank you for attending our VIP event - FORT Global North America 2023 - that was held at The Star, One Cowboys Way, Frisco, Texas in October 2023.

The event featured a diverse array of speakers ranging from the traditional financial world, all the way to the political realm, which featured Robert F. Kennedy Jr., a candidate for President of the United States. The theme of the event was "Bringing Together Global Investors Drawn to Texas and Texans Investing at Home and Going Global." The cross-section of attendees was amazing, as we had both investors locally and from abroad from locations such as China, India, and Saudi Arabia.

This is a core feature of what makes our events unique for networking. We also covered a wide range of topics including artificial intelligence with reference to investing, impact investing, institutional real estate, private markets, and more.

During the event, which was held at the massive global headquarters of the Dallas Cowboys, there were a number of large investors including key executives from family offices, sovereign wealth funds, endowments, pensions, large financial institutions, policymakers, real estate companies, media and publications,

asset managers, educational institutions, CEOs and entrepreneurs, athletes and influencers, and large companies. FORT Global Events foster collaboration, share knowledge, and create strategies among the world's leading families behind the family offices, policy makers, and influencers in conjunction with the greatest investment minds of sovereign wealth funds, pension, endowments, allocators, and asset managers to link, learn, and lead.

In addition, under the banner of the Sovereign Wealth Fund Institute Foundation, we continued our tradition of showcasing the newest recipients of the GOOD Fellows Award.

Please join us for future events as we seek to shape the world of investing by protecting generational wealth, preserving legacies, and promoting prosperity for the good, better, and the right.

All the best,

MICHAEL J. MADUELL

PRESIDENT,
SOVEREIGN WEALTH FUND INSTITUTE (SWFI)



ALL ABOUT SOVEREIGN WEALTH FUND INSTITUTE

SHAPING GLOBAL PROSPERITY

The Sovereign Wealth Fund Institute (SWFI) stands as an esteemed and influential organization, playing a pivotal role in shaping the trajectory of global prosperity. With a well-earned reputation in the industry of sovereign wealth funds (SWFs) and other asset owners, SWFI has emerged as a trusted information source for professionals, policymakers, and leaders worldwide.

Recognized as the foremost authority on SWFs, SWFI has pioneered research excellence, providing invaluable publications such as the Sovereign Wealth Quarterly. Other components of research include investor surveys, reports, and data-driven analysis. Our core product used by professionals is the SWFI Subscription which enables all of our research at your fingertips.

With meticulous attention to detail, the institute explores the intricacies of SWF investment strategies, asset allocation patterns, and governance practices, through enriching the intellectual landscape and facilitating informed decision-making. SWFI's commitment to knowledge exchange is exemplified through curated conferences, seminars, and training programs. Global Wealth Conference (GWC) series is the flagship conference series of SWFI.

Our platform links industry luminaries, policymakers, and allocators of capital from across the globe. A highlight of SWFI's endeavors includes the annual unveiling of the "SWFI100" ranking, a comprehensive compilation that showcases the largest SWFs, based on their assets under management (AUM).

This influential ranking serves as a vital reference for investors, researchers, and industry stakeholders, providing a panoramic view of the industry's growth and evolution.

Transparency and good governance are foundational principles championed by SWFI. Not only does the institute tirelessly advocate for increased disclosure and accountability standards within SWFs, but also does through nurturing an environment of trust and integrity in sovereign wealth management. By promoting best practices and adherence to international standards, SWFI enhances the credibility and impact of SWFs on the global economy.

As we reflect on the recent Global Wealth Conference in London, we acknowledge the profound contributions of SWFI to this respected event. The institute's expertise, dedication, and commitment to excellence have greatly enriched the conference's intellectual discourse, elevating the stature of GWC as a premier platform for advancing economic empowerment.

Sovereign Wealth Fund Institute embodies a legacy of knowledge, collaboration, and responsible wealth management. As we look to the future, SWFI's continued endeavors will undoubtedly shape the trajectory of global prosperity, inspiring generations to come.

SWFI LEADERSHIP TEAM

Guiding the future of finance with expertise and innovation - The SWFI Leadership Team



Lakshmi Narayanan
Chairman



Michael Maduell
President



Kim Diamond
Board Member



Karen Maduell
Chief Operating Officer



Wissam Kafsi
Vice President -
Relationship Management
SWFI Events - MENA



Bojan Kitanovic
VIP Relationship Manager
SWFI Events - MENA



Edward Longhurst-Pierce
Chief Executive Officer,
Events



KP Bhat
Chief Executive Officer
SWFI Data Labs



Igor Grahovac
Director
SWFI Events - MENA



Ajay Thota
Senior Advisor,
Technology



Ramprasad Raju
Creative Head



HOSTED **75+ EVENTS**
SUCCESSFULLY GLOBALLY

FACTS & FIGURES

Numbers speak for themselves.
18 years in business - we are the oldest, largest, and most trustworthy in our sapce.

OUR RELATIONSHIP IN NUMBERS

140	SOVEREIGN WEALTH FUNDS	20,000+	LISTED COMPANIES IN THE U.S.
9,600	ENDOWMENTS	GLOBAL ASSET MANAGERS WORTH \$50+	TRILLION AUM
3,600	FAMILY OFFICES	100 MEMBERS	GLOBAL INSTITUTIONS OF \$5 BILLION + AUM
1,500	FOUNDATIONS		
13,500	INSTITUTIONAL ADVISORS, CITY FUNDS, PENSION FUNDS, ASSET ALLOCATORS.		

- Published **50+** print and E-magazines
- Connected **10,000+** asset managers
- Launched **15+** transparency indices
- 20+** academic institutions





PRESERVING LEGACY. PROMOTING PROSPERITY.

LINK. LEARN. LEAD

FORT Global is an international thought leadership and convergence platform by the Sovereign Wealth Fund Institute® (SWFI)® that is driven by the purpose of protecting generational wealth, preserving legacies, and promoting prosperity for the good, better, and the right.

Family Office Roundtable Global Events foster collaboration, share knowledge and create strategies among the world's leading families behind the family offices, policymakers, and influencers in conjunction with the greatest investment minds of sovereign wealth funds, pension, endowments, allocators, and asset managers to link, learn, and lead.



ROCKS

are the cornerstone of Family Office Round Table (FORT) Events, providing the essential structure to its beliefs and practices.



RELATIONSHIP & RECOGNITION

FORT Events serve meeting point for visionaries and offer

- Foundation for collaboration
- Mutual trust and respect
- Sustainability and growth of wealth



KNOWLEDGE AND KICKSTART

FORT Events through exchange of knowledge helps guests to achieve:

- Powering progress through insights
- Collective insights for holistic growth
- Pooling experiences to navigate challenge



OPPORTUNITY & OUTREACH

FORT Events through opportunity sharing facilitates guests to:

- Broaden horizons
- Get exposed to new opportunities
- Harness combined potential



SYNERGY & SUSTAINABILITY

FORT Events through Synergy & Sustainability aid to:

- Build amplified power in unity
- Pool strengths for greater outcomes
- Foster sustainable collaborative ecosystems



CAPITAL & COLLABORATION

FORT Events through capital accessibility empowers guests to:

- Amplify impact through merging resources
- Harness finance to drive meaningful change
- Help in shaping a vibrant world





INTRODUCING GOOD FELLOWS

PIONEERING RESPONSIBLE WEALTH LEADERSHIP

Initiated by SWFI, the Global Order Of Outstanding Disruptors (GOOD) Fellows is a non-profit endeavor and a tribute to the 'Modern Greats of Wealth', the audacious and visionary individuals who, through innovation, integrity, and commitment, are redefining the narrative of wealth.



Thought Leadership In The Global Wealth Landscape



Knowledge Exchange Among The Brightest Minds



Responsible & Sustainable Wealth Practices



Positive Social Impact Through Conversations





CONVERSATIONS THAT INSPIRE

WHERE WEALTH AND WISDOM CONVERGE TO INSPIRE CHANGE

Within the larger frame of the GOOD Fellows Initiative, GOOD Talks emerges as a critical component. Here, thought leaders in global wealth gather to share a series of ideas, insights, and future visions.

GOOD Talks function as a meeting point for recognized leaders to discuss their depth of knowledge and expertise. It's more than just conversation—it's a shared experience that explores innovation, ethics, and societal impact.

Reminiscent of TED Talks but with a unique focus, GOOD Talks looks at the true nature of wealth, from its responsibilities to society to its potential for transformation. Each discussion is guided by SWFI Chairman Mr. Lakshmi Narayanan and offers an intimate 15-minute view into the lives, aspirations, and insights of our speakers.

Moreover, GOOD Talks extend beyond physical boundaries, reaching a global audience through various media platforms. The initiative aims to influence global awareness and attitudes, inviting everyone to participate in this resurgence of thought.



GOOD FELLOWS AWARDS

RECOGNIZING EXCELLENCE IN
GLOBAL WEALTH

In a landscape filled with exceptional talents, the GOOD Fellow Awards serve as a guide toward these outstanding individuals. The awards shine a light on the pioneers leading the charge in global wealth management.

WHAT ARE THE GOOD FELLOW AWARDS?

They are more than just commendations. The awards are an acknowledgment of a pathway marked by ingenuity, ethics, and societal influence. The GOOD Fellow Awards celebrate individuals taking active roles in responsible wealth management and investment.

THE SELECTION:

This prestigious award demands a rigorous process. Nominees are evaluated based on innovation, sustainability, leadership, philanthropy, and societal contribution. The final decision is made by a respected group of industry veterans and experts, representing the principles of the GOOD Fellows Awards champion.

GOOD FELLOW AWARDS AT FORT NORTH AMERICA:

This year, the ceremony unfolded at One Cowboys Way Atrium in Frisco, Texas—part of The Star, the cutting-edge headquarters of the Dallas Cowboys. The venue synergized with the GOOD Fellows Awards, encapsulating their foundational ethos.

THANK YOU TO THE GOOD FELLOWS



Navigating the Nexus of Stewardship and Global Synergy GOOD FELLOW AWARDS

Dear Pioneers and Protectors of Legacy,

I'm truly elated to announce that the FORT Global North America gathering at The Star, Dallas, Texas was nothing short of extraordinary. As Chairman of the Sovereign Wealth Fund Institute (SWFI), reflecting on this monumental gathering fills me with great satisfaction. As I draft this foreword, my heart is buoyed by the thought of our shared mission and the transformative paths we have begun paving. The energy, innovation, and collaboration witnessed were immensely amplified by the enthusiastic participation of global visionaries and stalwarts, like yourself.

The coffee table book you now hold is not merely a compilation of moments. It stands as a testament to the discussions, ideas, and visions that came to life during our time together at The Star. Amidst this global tapestry, new ideas were born, and enduring partnerships were solidified.

Over the span of two eventful days, the venue became a melting pot of diversified thoughts and innovative strategies. With influencers from around the globe, the grandeur of our assembly was further accentuated as the resounding harmony of a colossal \$11 Trillion USD AUM hall marked the event's unparalleled success.

Central to our gathering was the **GOOD FELLOWS Awards**. These awards are more than accolades; they symbolize our collective responsibility, urging us to continually strive for excellence and impactful leadership.

Our role transcends the mere accumulation of wealth. It challenges us to craft a legacy that can inspire change and engender a meaningful difference. The essence of the GOOD FELLOW Awards, a highlight of our summit, epitomizes this belief, aligning global efforts with principles of integrity, commitment, and service.

As you journey through this book, revisiting the insights and reflections from the awards and associated discussions, let them serve as guiding signposts, inspiring our collective efforts for the days ahead.

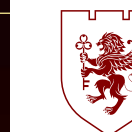
This book is dedicated to you, the visionaries who understand the profound implications of global leadership and actively work towards them. Let it be a beacon, reminding us of our shared commitment to ensure that our influence serves the greater good.

With heartfelt gratitude for your contributions and an enduring respect for our shared journey, I present this compilation to you. May it always serve as a touchstone of our shared past and an inspiration for our collective future.

In unity and with great respect,

LAKSHMI NARAYANAN,

**CHAIRMAN,
SOVEREIGN WEALTH FUND INSTITUTE (SWFI)**



AWARD WINNERS AT FORT NORTH AMERICA '23



FANNY M. CORNEJO

A maestro in media strategy; influential in shaping public discourse.

JEFF HOFFMAN

Serial entrepreneur; co-founder of Priceline.com, a catalyst in global startups.

CANDICE BEAUMONT

Investment virtuoso; noted for remarkable returns in private equity.

CHRISTINA WING

Business scholar; transformative influence in academic and corporate realms.

UCHE ORJI

Financial steward; innovator in guiding robust investment portfolios.

JACKIE SIEGEL

Philanthropy leader; impactful in societal upliftment and high society.



FANNY M. CORNEJO

EXECUTIVE DIRECTOR, YUNKAWASI
A GUARDIAN OF NATURE: PROTECTING THE DELICATE TAPESTRY OF BIODIVERSITY
RENOWNED CONSERVATIONIST

GOOD FELLOWS AWARD RECIPIENT, 2023
GOOD FELLOWS #2023

"Fanny M. Cornejo's dedication to the protection of threatened fauna stands as a testament to what the GOOD Fellows Awards represent. Her relentless pursuit of conservation and her role in reshaping the landscape of environmental stewardship is nothing short of inspiring."

Lakshmi Narayanan,

Fanny M. Cornejo is a Peruvian biologist with a postgraduate degree in anthropology and with more than 16 years of experience in research and conservation of threatened fauna in Peru, with emphasis on the Tropical Andes. She is co-founder and current executive director of the Yunkawasi Civil Association, where she works focused on the creation and management of conservation units, biological and social research, conservation education programs and promotion of sustainable development of local communities. Fanny is also a member and vice president for Peru of the Primate Specialist Group of the International Union for Conservation of Nature (IUCN) and a member of the CITES expert committee of the Ministry of the Environment of Peru.

Her work has been recognized by several organizations; In 2014 she received the Medal of Honor of the Order of Merit for Peruvian women for her outstanding professional activity from the Ministry of Women and Vulnerable Peoples of the Peruvian Government and was the first recipient of the Sabin Prize for the Conservation of Primates from the Sabin Family Foundation and Conservation International. In 2019, he contributed to the Ministry of the Environment and the Central Reserve Bank of Peru in the launch of a 1 Peruvian Nuevo Sol coin inspired by the yellow-tailed woolly monkey, with the coin based on one of his photographs of this species.

In this year, 2023, she has been announced as the inaugural winner of the Emerging Conservationist Award, an award given by the prestigious Indianapolis Prize, for her career and contribution to the conservation of threatened primates in Peru, such as the yellow-tailed woolly monkey, the Andean night monkey, and the monkey machin of Tumbes. She has also received the "Carlos Ponce del Prado Conservation Award" in the category of "Artificer of Conservation" for her contribution to biodiversity conservation and sustainable development in Peru. In addition, she has been included by Forbes magazine as one of the 50 most powerful women in Peru.



ELIZABETH II AFRICA GENERAL SERVICE MEDAL 1902-56

Issued to: PJ Weber
 Date of Original Medal Issuance: The medal was first approved on 1902. The Africa General Service Medal was instituted by King Edward VII.
 Medal Number: #295-6478
 Original Medal: This is an original campaign in Africa Medal



In the sweeping narratives of colonial Africa, an honour was forged in the fires of service and duty. This emblem was none other than the Africa General Service Medal (1902), a distinguished reward conferred upon the select few who exhibited unflinching commitment in the diverse campaigns of Somaliland Kenya.

Today, as we traverse the dynamic world of global wealth, the spirit of this distinguished medal finds its echo in the heart of the GOOD Fellows initiative.

Fanny M. Cornejo's commitment to the conservation of threatened species and habitats in the Tropical Andes is both commendable and critical. Her role at Yunkawasi and the numerous accolades she has received are reflections of her unparalleled dedication to the preservation of nature. Fanny's recognition in influential lists and her numerous awards speak to her influence and impact in the realm of conservation.

The Elizabeth II Africa General Service Medal 1902-56 that Fanny receives is symbolic of unwavering dedication across vast terrains. It beautifully encapsulates her work in conserving biodiversity across the rich landscapes of the Tropical Andes. As you traverse this section, immerse yourself in the tale of a woman whose life's work echoes an undying commitment to nature and its myriad wonders.

As you traverse the pages dedicated to Fanny M. Cornejo in this Coffee Table Book, discover the journey of a guardian dedicated to preserving the intricate web of life on our planet.



GOOD FELLOWS - ELIZABETH II AFRICA GENERAL SERVICE MEDAL 1902-56

Awarded to
Fanny M. Cornejo,
 Dallas, Texas
 Fort North America 2023



JEFF HOFFMAN

FOUNDER & CEO, WORLD YOUTH HORIZONS
 A VISIONARY ENTREPRENEUR: BRIDGING THE CHASM BETWEEN BUSINESS
 SAVVY AND HUMANITARIAN ASPIRATIONS
 WORLD CLASS ENTREPRENEUR & PHILANTHROPIST

GOOD FELLOWS AWARD RECIPIENT, 2023
GOOD FELLOWS #2023

"Jeff Hoffman's entrepreneurial spirit, combined with his heart for global development, embodies the epitome of the GOOD Fellows Awards. His dedication to merging business excellence with humanitarian outreach has not only inspired budding entrepreneurs but has also left an indelible mark on our global society."

Lakshmi Narayanan,
Chairman, Sovereign Wealth Fund Institute

Jeff Hoffman is an award-winning global entrepreneur, proven CEO, worldwide motivational speaker, bestselling author, Hollywood film producer, a producer of a Grammy Award winning jazz album, and executive producer of an Emmy Award winning television show. He is an Executive Producer and stars in the groundbreaking new TV series GOING PUBLIC, a show where viewers worldwide can invest in the startups that Jeff is mentoring on the air. In his career, he has been the founder of multiple startups, he has been the CEO of both public and private companies, and he has served as a senior executive in many capacities. Jeff has been part of a number of well-known successful startups, including Priceline.com/Booking.com, uBid.com and more.

Jeff is the Chairman of the Global Entrepreneurship Network, which works with entrepreneurs in 200 countries, as well as being a founding board member of The Unreasonable Group, whose portfolio companies have raised over \$11 billion in funding and have positively impacted more than one billion lives worldwide. He is also on the Advisory Board of CEED Global, the Centers for Entrepreneurship and Executive Development, teaching entrepreneurship globally in developing countries. Jeff has supported the White House, the State Department, the United Nations, and similar organizations internationally on economic growth initiatives and entrepreneurship programs.

Jeff is the Managing Partner of Jeff Hoffman Advisory Services, a strategic consulting firm that teaches exponential growth to business owners and entrepreneurs, as well as teaching innovation strategies to corporations and governments worldwide. Jeff serves on the boards of companies in the US, Europe, the Middle East, South America, Africa, and Asia. He supports entrepreneurs and small businesses on a worldwide basis. Jeff is also the founder and CEO of World Youth Horizons, a non-profit organization providing homes, schools, food, and health care to children in need around the globe.

Jeff is a frequent keynote speaker, having been invited to speak in over 70 countries. He speaks on the topics of innovation, entrepreneurship, and business leadership, and is the author of the book SCALE, a how-to guide for growing your business. Jeff also teaches innovation workshops to major corporations on a regular basis.

Jeff is a featured business expert seen on Fox News, Fox Business, CNN, CNN International, Bloomberg News, CNBC, ABC, and NPR, and in publications including Forbes, Inc., Time, Fast Company, the Wall Street Journal, and more.

Jeff recently a Humanitarian Award from Disney and Be Great, as well as a Lifetime Achievement Award from the Los Angeles Tribune for his business and philanthropic contributions. He was honored with the Champion of Entrepreneurship Award from JP Morgan Chase, Citibank, and Rising Tide Capital, as well as receiving the George Brown Award for International Cooperation from the US State Department. Jeff received the Commitment to Excellence Award from CitySummit, as well as receiving a Lifetime Achievement Award and being inducted into the Entrepreneurs Hall of Fame for his contributions to the field of entrepreneurship. He was also honored with the Best of the Best Award from the national CEO association (Collegiate Entrepreneurship Organization).

Outside of the world of technology, Jeff has produced TV shows, has produced movies in Hollywood, has produced musical events including concerts, tours, and charity events with such artists as Elton John, Britney Spears, NSYNC, Boyz II Men, and others, and serves on numerous charity and non-profit boards.



EGYPT MEDAL (1882-1889)

Issued to: Pte. W. Thomas 1/Yorks
British Army and Royal Navy personnel who were involved
in military actions during the 1882 Anglo-Egyptian War
and in the Sudan between 1884 and 1889.
Date of Original Medal Issuance: The medal was first
instituted in 1882.
Medal Number: #1089 Original Medal: This is an
original Egypt Medal.



The Egypt Medal, a tangible emblem of duty and bravery, was awarded during a time of fierce conflict. This emblem resonates with the GOOD Fellows, as they too confront challenges in their pursuit of sustainable wealth management.

Their work, like the service of those who earned the Egypt Medal, is characterised by resolve and unyielding commitment.

Jeff Hoffman's extraordinary journey from founding monumental ventures such as Priceline.com to orchestrating the influential initiative, World Youth Horizons, paints the portrait of a man dedicated to global progress. With every venture, Jeff strives to seamlessly weave business acumen with a commitment to a larger cause.

His recognition from revered institutions and influential entities is a testament to his unique approach to entrepreneurship.

It is profoundly fitting that Jeff is the recipient of the Egypt Medal (1882-1889), an emblem of courage and dedication during challenging times. This honor parallels his audacious pursuits in business and his enduring commitment to fostering global unity and development.

As you navigate through these pages, immerse yourself in the narrative of a leader whose actions truly resonate with the spirit of transformation and progress.



GOOD FELLOWS - EGYPT MEDAL (1882-1889)

Awarded to
Jeff Hoffman,
Dallas, Texas
Fort North America 2023



CANDICE BEAUMONT

CHAIRMAN, SALSANO GROUP

A PIONEER OF FINANCE: AT THE INTERSECTION OF INVESTMENT WISDOM
AND PHILANTHROPIC IMPULSE. GLOBAL FINANCIAL MAVEN

GOOD FELLOWS AWARD RECIPIENT, 2023

GOOD FELLOWS #2023

"Candice Beaumont stands as a monumental figure in the world of finance, exemplifying the very essence of the GOOD Fellows Awards. Her forward-thinking strategies and dedication to sustainable investments mirror the values that we hold in the highest regard."

Lakshmi Narayanan,
Chairman, Sovereign Wealth Fund Institute

Candice Beaumont serves as Chairman of the Salsano Group, a Panama based family office & conglomerate invested in private equity. She is also Chief Investment Officer of L Investments, a single-family office invested in public and private equity. She oversees all capital allocation decisions for the internal fund of funds as well as the direct investment portfolio. Ms. Beaumont has been a speaker at numerous family office and investment conferences globally and is a NYU Stern Family Office Council member serving on the Steering Committee.

She also served on the Steering Committee of the Yale University School of Management College of Family Offices, as well as the Princeton University Council of Family Offices and Endowments. Ms. Beaumont is a member of the Board of Directors of numerous SPACs including Clean Earth Acquisition Corp. (Nasdaq: CLINU), Israel Acquisitions Corp (Nasdaq: ISRLU) is an Advisor to Athena Technology Acquisition Corp (NYSE: ATHN.U) and Advisor to Springwater Situations Corp. (NASDAQ: SWSSU).

She also serves on the board of GoLogiq, Inc. (OTC: GOLQ), a U.S.-based global provider of fintech and consumer data analytics. Candice is an Advisory Board member of the Family Office Association, a global membership organization exclusive to single family offices

and families of significant wealth, as well as a committee member of the 1640 Society that caters to single family offices & ultra high net worth families. Candice was a member of the Board of Directors of I2BF Venture Fund II, a DFSA regulated clean tech venture capital firm with offices in Dubai, New York, & London as well as an Advisory Board member of The Luxury Fund.

She was also advisor to New Frontier Bio, a private investment arm of the Kennedy family, which co-founds, develops, and finances early stage innovative healthcare companies that have the potential to achieve validation, by transforming millions of lives and creating highly valuable businesses.



KING'S SOUTH AFRICA MEDAL 1901-1902



The King's South Africa Medal, graced with the image of King Edward VII in his prime military attire, serves as a symbol of both the valor of those days and the dedication GOOD Fellows bring to their domain today.

Each medal, especially with its distinguished clasps - "South Africa 1901" and "South Africa 1902" - tells a story, a narrative that parallels the challenges faced by the GOOD Fellows.

Issued to: "J. Combs, Devon Regiment"
 Date of Original Medal Issuance: 1902, commemorating dedicated service in the heartlands of South Africa during the tumultuous years of 1901 and 1902, indicate service during those specific years.
 Medal Number: #4708, signifying one among the brave hearts who showcased resilience and dedication amidst the adversities of the Second Boer War.

Candice Beaumont's ascendancy in the world of finance and investment is both awe-inspiring and exemplary. With the adept handling of Salsano Group and L Investments, she exhibits a profound understanding of global markets and their intricate dynamics. Candice's dedication to ethical investments and her unparalleled strategic insight is a testament to her commitment to a brighter, sustainable future.

The King's South Africa Medal 1901-1902 awarded to Candice symbolizes resilience and determination, attributes she embodies as she steers financial ventures through unpredictable terrains.

As you delve deeper into these pages, witness the journey of a financial maven whose every step echoes the spirit of commitment and foresight, reminiscent of the storied history behind the medal she receives.

As you delve into the pages dedicated to Candice Beaumont in this Coffee Table Book, appreciate the odyssey of a woman who has redefined the boundaries of finance and philanthropy.

GOOD FELLOWS - KING'S SOUTH AFRICA MEDAL 1901-1902

Awarded to
Candice Beaumont,
 Dallas, Texas
 Fort North America 2023





Thank
you

LETTER TO SWFI FROM
Candice Beaumont

Dear SWFI Conference Team,

It is an honor to receive the GOOD Fellows Award at the FORT North America 2023 event. I take this accolade as a recognition of my commitment to integrate responsible practices in the fields of finance and philanthropy.

In my roles with the Salsano Group and L Investments, I have aimed to make decisions that positively impact both the business world and the broader community. This aligns with the GOOD Fellows Initiative's emphasis on ethical leadership and visionary influence, values that I hold in high regard in my professional endeavors.

Additionally, my involvement in philanthropic activities, including the International Council of Advisors for Global Dignity and various charitable organizations, is an effort to fulfill the responsibility that comes with leadership in finance. Supporting initiatives that promote education, dignity, and community welfare is integral to my belief in contributing positively to society.

Thank you for this recognition and for including me in a group of leaders who are dedicated to making a meaningful difference.

Sincerely,

Candice Beaumont

C

"Connecting with the right people and relationships is really the cornerstone of life. Come back to this gathering that you created and put the right people in the room and relationships are built that can make difference."



CANDICE BEAUMONT

Chairman, Salsano Group

A PIONEER OF FINANCE: AT THE INTERSECTION OF
INVESTMENT WISDOM AND PHILANTHROPIC IMPULSE.
GLOBAL FINANCIAL MAVEN



CHRISTINA WING

FOUNDER, WINGSPAN LEGACY PARTNERS
A GUIDING STAR IN FAMILY ENTERPRISE: ILLUMINATING PATHS OF LEGACY AND
LEADERSHIP - DISTINGUISHED EDUCATOR & ADVISOR

GOOD FELLOWS AWARD RECIPIENT, 2023
GOOD FELLOWS #2023

"Christina Wing, with her unparalleled insight into family businesses and legacies, truly exemplifies the essence of the GOOD Fellows Awards. Her contributions have been invaluable in guiding numerous enterprises towards a future of growth and sustainability."

Lakshmi Narayanan,
Chairman, Sovereign Wealth Fund Institute

Cristina is a Senior Lecturer of Business Administration, on the faculty at Harvard Business School, specializing in Family Enterprises. She is also Faculty Chair of HBS's Family Business Executive Education Program and Co-Chair of the Family Office Wealth Management Executive Education program and Rising Generation in the Family Enterprise Program

Christina Wing has written over 50 HBS cases in the family enterprise space, in addition to numerous other technical notes. She is a prolific publisher in the space.

She is on the Board of Advisors for several private equity firms and a private infrastructure company.

Christina's early career was very impressive with experience at companies such as Goldman Sachs, Kidder Peabody, New Harbor Incorporated, edu.com etc.

Christina is also an impressive golfer.



KING GEORGE V MEDAL (1916-1919)

Original Medal Recipient: Pte. John William Jones
service number 5161, 14 / INF. Bn. A.I.F.
Date of Original Medal Issuance: The medal was first
instituted in on 25 March 1916
Original Medal Recipient: John Williams Johns
Medal Number: #3192



The turbulent times of World War I bore witness to countless acts of valor, bravery, and commitment, many of which have found a place in the annals of history. Amidst these tales of heroism stands the Military Medal of King George V, instituted in 1916.

This emblem of honor was bestowed upon the non-commissioned officers and soldiers for their unparalleled bravery, a testament to their unwavering dedication to their nation and cause.

Christina Wing's journey is a beacon for family enterprises navigating the complexities of legacy and leadership. Through her teachings at the Harvard Business School and her advisory roles, she has illuminated the paths for countless family-run enterprises. Christina's multifaceted profile, enriched by her experience with eminent firms and her passion for golf, paints a picture of a leader with depth and dynamism.

Being bestowed with the King George V Medal (1916-1919) is emblematic of her journey. This honor, reminiscent of dedication and resilience, mirrors Christina's enduring commitment to family enterprises. As you explore these pages, get acquainted with an influential figure whose endeavors span across varied domains, reflecting excellence and commitment in every stride.

As you journey through the pages dedicated to Christina Wing in this Coffee Table Book, witness the story of a visionary guiding enterprises towards enduring legacies.

GOOD FELLOWS - KING GEORGE V MEDAL (1916-1919)

Awarded to
Christina Wing,
Dallas, Texas
Fort North America 2023





Thank
you

LETTER TO SWFI FROM
Christina Wing

Dear SWFI Members,

Thank you for conferring the GOOD Fellows award on me. This recognition of my contributions in the field of family enterprise and leadership at Harvard Business School, as well as my work with Wingspan Legacy Partners, is received with a sense of professional validation.

The intersection of my academic research and practical application in family enterprises aligns with the objectives of the GOOD Fellows Initiative, particularly in its commitment to fostering sustainable business practices and insightful leadership. The significance of family enterprises in the broader economic landscape has been a key focus of my career, and this award reflects an understanding of that work's relevance.

Continuing to explore and enhance effective governance in family enterprise remains a priority, with an eye towards the stability and growth they contribute to the global economy. This award, therefore, serves as a marker of the impact of such endeavors and a prompt to persist in these efforts.

Once again, thank you for the recognition. I look forward to further contributing to the discourse on family enterprises and leadership.

Sincerely,

Christina Wing

C

"Succession should start the minute you are in a job. If you are in a non-family entity there is always a plan for succession. In terms of family offices and family enterprises their only way to continue is with succession planned."



CHRISTINA WING

Founder, Wingspan Legacy Partners

A GUIDING STAR IN FAMILY ENTERPRISE: ILLUMINATING
PATHS OF LEGACY AND LEADERSHIP –
DISTINGUISHED EDUCATOR & ADVISOR



UCHE ORJI

CO-FOUNDER/PARTNER
TITANGATE CAPITAL MANAGEMENT
FORMER MANAGING DIRECTOR AND CHIEF EXECUTIVE OFFICER AT
NIGERIAN SOVEREIGN INVESTMENT AUTHORITY (NSIA)
A PARAGON OF FINANCIAL STEWARDSHIP:
CHARTING NIGERIA'S ECONOMIC ASCENDANCY, GLOBAL ASSET LEADERSHIP

GOOD FELLOWS AWARD RECIPIENT, 2023
GOOD FELLOWS #2023

"Uche Orji's trajectory in the spheres of global finance and Nigerian economic fortification is nothing short of monumental. His commitment to economic growth and his adept leadership at NSIA illuminate the spirit of the GOOD Fellows Awards. His guiding hand in Nigeria's sovereign wealth sphere echoes the initiative's emphasis on global fiscal prudence and robust financial leadership."

Lakshmi Narayanan,
Chairman, Sovereign Wealth Fund Institute

Uche Orji is the former Managing Director and Chief Executive Officer of the Nigeria Sovereign Investment Authority (NSIA) and has served in this capacity since inception of the Authority. He brings over three decades of global experience spanning banking, asset management and financial services to the leadership of the Authority. In addition to his role as MD & CEO, NSIA, he serves on the Boards of the Infrastructure Credit Guarantee Company Ltd (InfraCredit) as Chairman, and Non-executive Director at the Development Bank of Nigeria (DBN), Family Homes Funds Ltd (FHFL), NG Clearing Ltd and Nigeria Mortgage Refinance Company (NMRC).

Prior to leading the NSIA, he worked in various organizations including; UBS Securities, New York, where he was a Managing Director and Global Coordinator of Semiconductor Equities Research; JP Morgan Securities, London, where he was a Vice President and later Managing Director within the Equities Division and Analyst in charge of European Semiconductor Equities Research; Goldman Sachs Asset Management where he was an Executive Director serving as Analyst/Portfolio Manager covering chemicals and telecommunication equipment sectors, as well as co-manager of Global Technology Fund and pan-European equities fund. Preceding his international work experience, he had served as the Acting Financial Controller at Diamond Bank Plc (now part of Access Bank Plc), Nigeria, and started his career in the audit group of

Arthur Andersen & Co. He completed his National Youth Service in Bauchi, where he worked at the Nigeria Industrial Development Bank, NIDB (now Bank of Industry).

As an analyst, he advised leading global asset managers, ranking #1 in Europe and top 3 in the United States according to Institutional Investors Magazine All-Equities Analyst Ranking. As part of his sector coverage, he provided strategic advice to the Management of leading companies such as Intel Electronics, Nvidia, ASML, Philips Electronics, AMD and Texas Instruments; and as global coordinator covered global companies such as Samsung Electronics, Toshiba, Nikon, Canon and Hynix. He has authored/co-authored hundreds of research papers in the Semiconductor sector as well as the broader technology investment sectors and was a regular commentator on the technology sector on all major news media.

Uche studied Chemical Engineering at the University of Port Harcourt, Nigeria, graduating in 1990, and subsequently obtained an MBA from Harvard Business School in 1998.



INDIA SERVICE MEDAL 1939-1945

Original Medal Recipient: Lt. R. Henderson, Womens' forces
 Institution: 6 June 1946
 Time Period: World War II
 Medal Number: #5678
 Country: Great Britain
 The India Service Medal - 1939-1945 stands as an emblem of this unwavering spirit, echoing parallels with the journey of the GOOD Fellows Initiative.



As the world was embroiled in the throes of World War II, the vast expanse of India remained a land of unwavering resilience. Between 3 September 1939 and 2 September 1945, countless service members, including reserve, state, and women's forces, contributed to the war effort without direct combat, showcasing commitment, perseverance, and steadfast dedication.

The India Service Medal - 1939-1945 stands as an emblem of this unwavering spirit, echoing parallels with the journey of the GOOD Fellows Initiative.

Uche Orji's dynamic journey in the financial world is emblematic of visionary leadership and unparalleled expertise. With a career that has gracefully spanned across continents, from the halls of UBS Securities in New York to the foundational years of the Nigeria Sovereign Investment Authority, Orji has etched his mark as a financial stalwart. His leadership at NSIA is a testament to his unwavering commitment to Nigeria's economic prosperity, setting benchmarks for other nations to follow.

His illustrious career in international finance houses like JP Morgan and Goldman Sachs, coupled with his early endeavors at Diamond Bank and Arthur Andersen, showcase a holistic understanding of global finance dynamics.

As an analyst, his foresight and advisory prowess ranked him among the best globally, aiding technological giants in shaping

their fiscal strategies. Orji's educational laurels, from the University of Port Harcourt to the prestigious Harvard Business School, underline his perpetual thirst for knowledge.

Uche's accolade, the India Service Medal 1939-1945, symbolizes the unwavering resilience and dedication showcased by countless service members during World War II. Their roles, though not directly in combat, were instrumental in the war effort. Much like the spirit of these stalwarts, Uche's endeavors resonate with commitment, perseverance, and unwavering dedication.

GOOD FELLOWS - INDIA SERVICE MEDAL 1939-1945

Awarded to
Uche Orji,
 Dallas, Texas
 Fort North America 2023





Thank
you

UCHE ORJI
90 IVERNA COURT, LONDON, W8 6TU, UNITED KINGDOM. Uche.orji@gmail.com; +447415200489

Dear SWFI,

I am writing to express my sincere appreciation for being honored with the GOOD Fellows Award at the FORT North America 2023 event. This recognition holds a special place for me, reflecting not just my career in finance and investment, but also my dedication to fostering economic development and sustainability.

Throughout my career, from my analytical roles in global investment banks to leading the Nigeria Sovereign Investment Authority and co-founding Titangate Capital Management, I have always focused on creating sustainable financial strategies that benefit not just investors but also the broader community. My involvement with the European Union Commission in mobilizing capital for lower- and middle-income countries and my work with the Private Infrastructure Development Group exemplify my commitment to ethical investment and infrastructure development. These efforts resonate with the GOOD Fellows Initiative's aim to celebrate leadership that drives significant and positive change.

Thank you for acknowledging my contributions and for the opportunity to be part of a community that values transformational change and responsible leadership. I am grateful for this honor and am inspired to continue my efforts in bridging the gap between capital and sustainable development, ensuring that finance serves as a force for good in our world.

Kind regards,
Uche Orji

U

"Watching my country heal, after a very long conflict, and watching my group getting reintegrated back to the country was very inspiring in terms of how to coexist with other people and helped shape my journey."



UCHE ORJI

Co-Founder/Partner

Titangate Capital Management

Former Managing Director and Chief Executive Officer at Nigerian Sovereign Investment Authority (NSIA)

A PARAGON OF FINANCIAL STEWARDSHIP:
CHARTING NIGERIA'S ECONOMIC ASCENDANCY,
GLOBAL ASSET LEADERSHIP



JACKIE SIEGEL

FOUNDER, VICTORIA'S VOICE FOUNDATION
A PHOENIX RISING: FROM POP CULTURE ICON TO ADVOCATE
AGAINST OPIOID CRISIS

GOOD FELLOWS AWARD RECIPIENT, 2023
GOOD FELLOWS #2023

"Jackie Siegel's transition from the shimmer of pop culture limelight to the solemn advocacy against the opioid epidemic represents the heart of the GOOD Fellows Awards. Her determination to pivot tragedy into advocacy epitomizes the transformative power of wealth and influence for societal betterment."

Lakshmi Narayanan,
Chairman, Sovereign Wealth Fund Institute

Jackie Siegel is best known for her role in the award-winning documentary feature, Queen of Versailles (Magnolia Pictures), which premiered at the Sundance Film Festival in 2012 and continues to be one of the most popular movies on Netflix. The documentary was also included on Vogue's list of "66 Best Documentaries of All Time." Jackie earned the title "Queen" when in 2003 she and husband, David Siegel, began an extravagant project to build the largest private residence in the U.S. named Versailles.

However, the ambitious construction abruptly halted to a grind as the 2008 recession dented their fortune. The rise and fall of their grand ambitions were captured in the critically acclaimed 2012 documentary based on their plans for the 108,000 square-foot mansion near Orlando, FL. Currently on track for completion in the fall of 2024, there's rumor that the French original may look modest by comparison to the Siegel's version with 13 bedrooms, 10 kitchens, an ice skating rink, not to mention a 5,000-square-foot closet. As an intriguing fixture in pop culture, Siegel has made headlines with mainstream media (including Us Weekly and People Magazine) and has appeared on hit television shows like Bravo's Flipping Out and Watch What Happens Live with Andy Cohen.

She also appeared as a guest on the reality series, Below Deck. Her new TV series The Queen of Versailles Reigns again has aired in Discovery Plus with a 2nd season to debut in HGTV this fall. She is also in the process of developing a Broadway show with the same producers of Wicked with Kristen Chenoweth accepting the role as The Queen of Versailles. Mrs. Siegel seats on the board of Westgate Resorts, the largest privately owned timeshare organization while she maintains investments in various real estate and alternative investments. However, in 2016, David and Jackie's world changed forever when their then 18-year daughter, Victoria, died of a drug overdose. This tragedy has trajected them into a new life purpose: to save lives

through drug prevention programs. As a result, the Siegels have created a foundation in Victoria's memory called Victoria's Voice.

Its purpose is to bring drug prevention education into the schools, offer healthy social media opportunities for young people, and assist first responders in receiving and administering Narcan (Naloxone) to an overdose victim, which has proven to save lives. When Victoria was discovered, she still had a heartbeat. It's possible she could have been saved if the first responders had been equipped with Narcan. She continues to schedule a full calendar as a model, actress, and philanthropist, but since Victoria's loss, more priority is now given to Victoria's Voice foundation as she and her husband tirelessly work to bring local communities, state legislatures and even the federal government in agreement to do more about the opioid epidemic and its often tragic results. The former Mrs. Florida America is actively involved in the national Mrs. America organization and now many of the beauty queens have become outspoken advocates of Victoria's Voice and saving lives.

After Victoria's death, a friend of hers suggested to the Siegels that they look in her bedside table and read through a diary Victoria kept. They decided to leave it just as she left it with drawings, poems, heartfelt feelings of loneliness and sadness. It is a very emotionally-charged read that all need to take heed of. It is a glimpse into the heart of a hurting teen that reveals to parents not uncommon struggles of their children. "If only one life can be saved through our efforts," says Mrs. Siegel, "it will have been worth all of the time, effort, and money." The book is aptly titled, "Victoria's Voice."



GEORGE V KAISAR I HIND AFGHANISTAN NORTH WEST FRONTIER MEDAL (1919)

Issued to: Robert Charles Duncan Graves
 Issue to: officers and men of the British and Indian
 armies. From 1919, it
 was also awarded to officers and men of the Royal
 Air Force. With the
 Waziristan 1925 clasp awarded solely to the RAF
 Medal Number: #4521
 Date of Original Medal Issuance: 1919
 The medal was first instituted in 1909
 This is an original Campaign Service Medal.



Drawing parallels with the GOOD Fellows Initiative, one finds the spirit of adaptability, resilience, and forward-thinking. Much like the soldiers who earned the George V Clasp Afghanistan NWF 1919, confronting challenges head-on and adapting to new realities, the GOOD Fellows exemplify these qualities in the realm of global wealth.

Jackie Siegel, widely recognized as the 'Queen of Versailles', has painted a vivid journey from luxurious aspirations to heartfelt advocacy.

Her narrative, marked by the construction of America's largest private residence, is an emblem of grandeur and ambition. But when tragedy struck with the loss of her daughter Victoria, Jackie's world view transformed. From the echelons of luxury, she descended into the harsh realities of the opioid crisis, channeling her influence and resources towards making a difference.

The creation of the 'Victoria's Voice' foundation is her passionate answer to this menace, echoing her dedication to the cause. The journey from the 'Queen of Versailles' to a beacon against drug abuse is a testament to Jackie's resilience, empathy, and commitment.

Through these pages, witness the metamorphosis of a woman from an icon of extravagance to a crusader for a cause, reshaping

her legacy for a more profound societal impact.

Jackie's award, the **George V Kaiser I Hind Afghanistan North West Frontier Medal (1919)**, draws an intriguing parallel to her journey. Much like the soldiers who earned this honor for confronting challenges head-on and adapting to ever-changing circumstances, Jackie, too, embodies resilience, adaptability, and forward-thinking in her philanthropic pursuits.

Through these pages, immerse yourself in the inspiring narrative of Jackie Siegel, a woman whose endeavors extend far beyond the public eye, reflecting a heart devoted to meaningful change.

GOOD FELLOWS - GEORGE V KAISAR I HIND AFGHANISTAN NORTH WEST FRONTIER MEDAL (1919)

Awarded to
Jackie Siegel,
 Dallas, Texas
 Fort North America 2023





SWFI ICON AWARD: A CATALYST FOR COMMUNITY CHANGE

An ICON is more than a leader; they are visionaries and pioneers in various fields, whether social, economic, cultural, or sustainable development. These are people who have challenged norms and amplified their impact through networking. The ICON Award aims to honor diverse individuals, from industry-changing entrepreneurs to community-activating activists, from culture-shaping artists to boundary-pushing scientists.

THE ETHOS OF ICON

The core philosophy of the ICON Award is that meaningful change occurs when people connect, share ideas, and collaborate. Each ICON recipient sets off a chain reaction, inspiring others to act. Their achievements are measured not just by their accomplishments but by the lives they touch and the change they instigate through their network.

NOMINATION AND SELECTION PROCESS

ICONS are a unique group, chosen for their extraordinary influence and impact. Nominations come from the SWFI GOOD Fellows and previous ICON recipients, ensuring a high-caliber selection process. This approach draws from a pool of individuals who have shown exceptional dedication to their fields.

ACKNOWLEDGMENT AT SWFI EVENTS

At upcoming SWFI events, ICONs are highlighted to attendees and delegates. Their stories and influence are showcased, providing insights into their broad impact. They receive a certificate of appreciation and a keepsake to honor their contributions.



**DR. MAHA
ACHOUR**
Venture Partner,
Chakra Fund

ICON AWARD WINNERS AT FORT NORTH AMERICA



November 01, 2023

Dear SWFI and FORT Global Team,

Thank you for the honor of being part of FORT North America 2023. Being conferred the ICON Award amidst such luminaries is not only a recognition but a significant milestone. I truly believe that technology should be harnessed for greater societal good, either directly or through financial empowerment, and I see this award as a validation of my efforts aimed at bridging the realms of cutting-edge technology and finance.

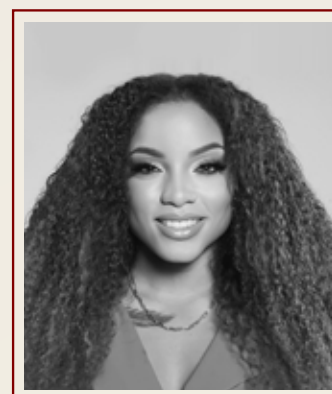
I would also like to extend my gratitude for the opportunity to sit on the "AI in Finance - The Future Outlook" panel, which proved to be an enriching experience. The insightful discussions were invigorating and showcased the profound potential and the forward trajectory of technology in reshaping the financial landscape, while at the same time highlighting the limitations of some of the recent advances in AI.

Overall, the event was impeccably organized, fostering meaningful exchanges that I look forward to nurturing.

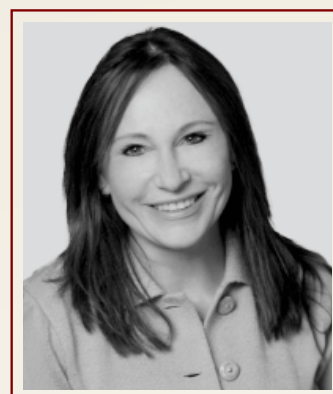
Here's to innovation, collaboration, and a world brimming with possibilities!

Warmest regards,

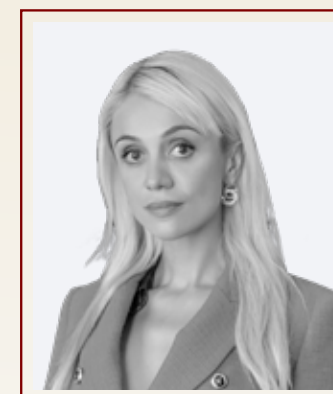
Dr. Maha Achour
Venture Partner,
Chakra Fund



SANTIA BARNES
CEO,
TRONUS



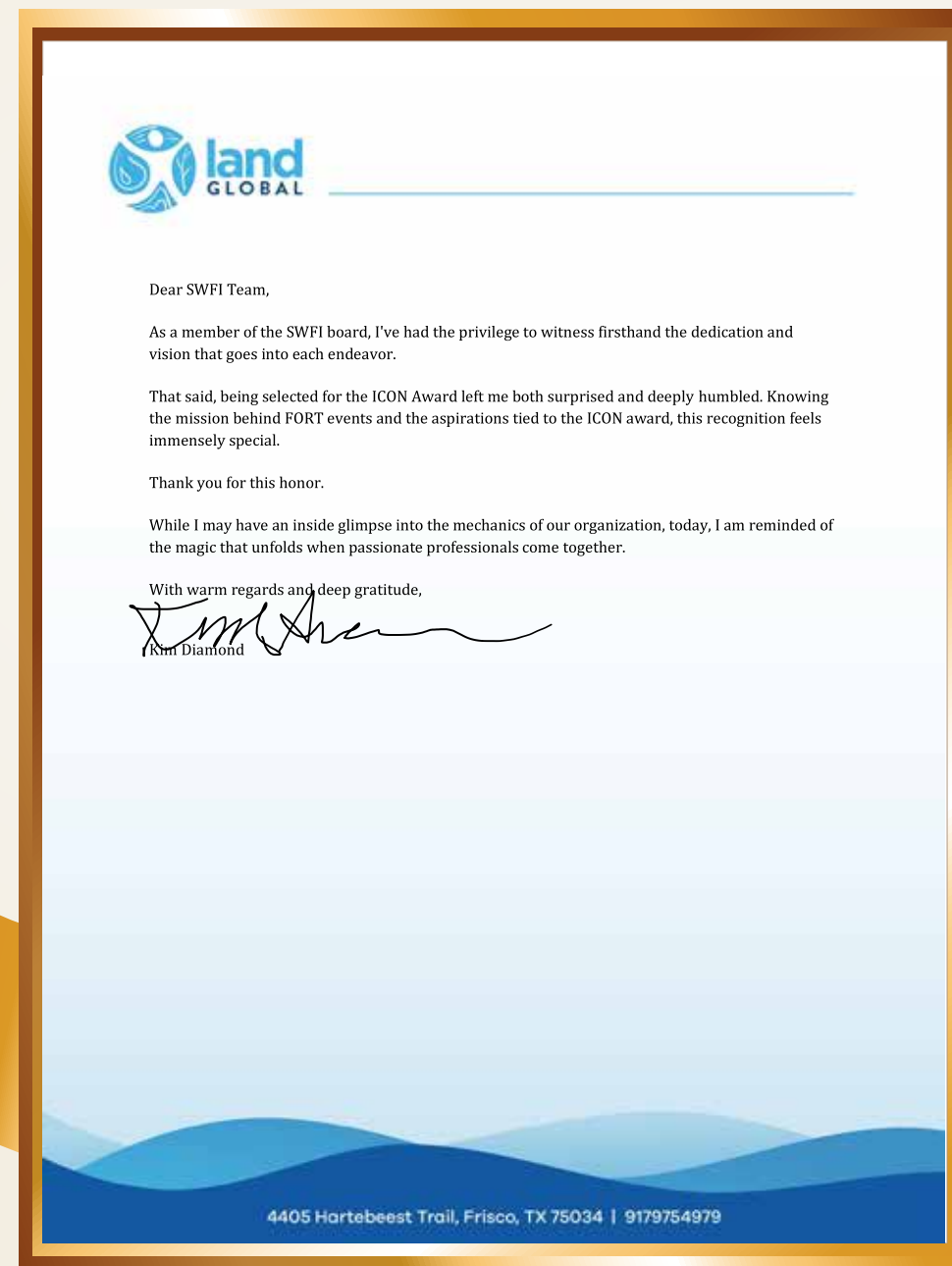
KIM DIAMOND
Co-Founder & CEO,
Land Global



DR. ANA NACVALOVAITE
Research Fellow,
Kellogg College



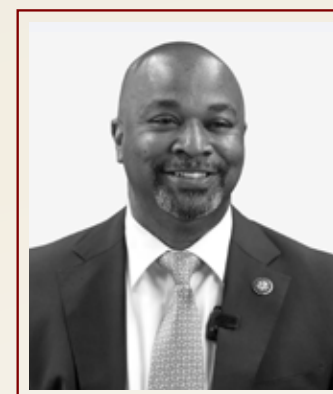
STELLA YIN
Vice Chairman,
HEROSE CLUB





H.E. UDAYA INDRARATHNA

Sri Lankan Ambassador to the United Arab Emirates, Senior Board Advisor, SWFI



KWANZA HALL

Congressman, Hill & Hall Global



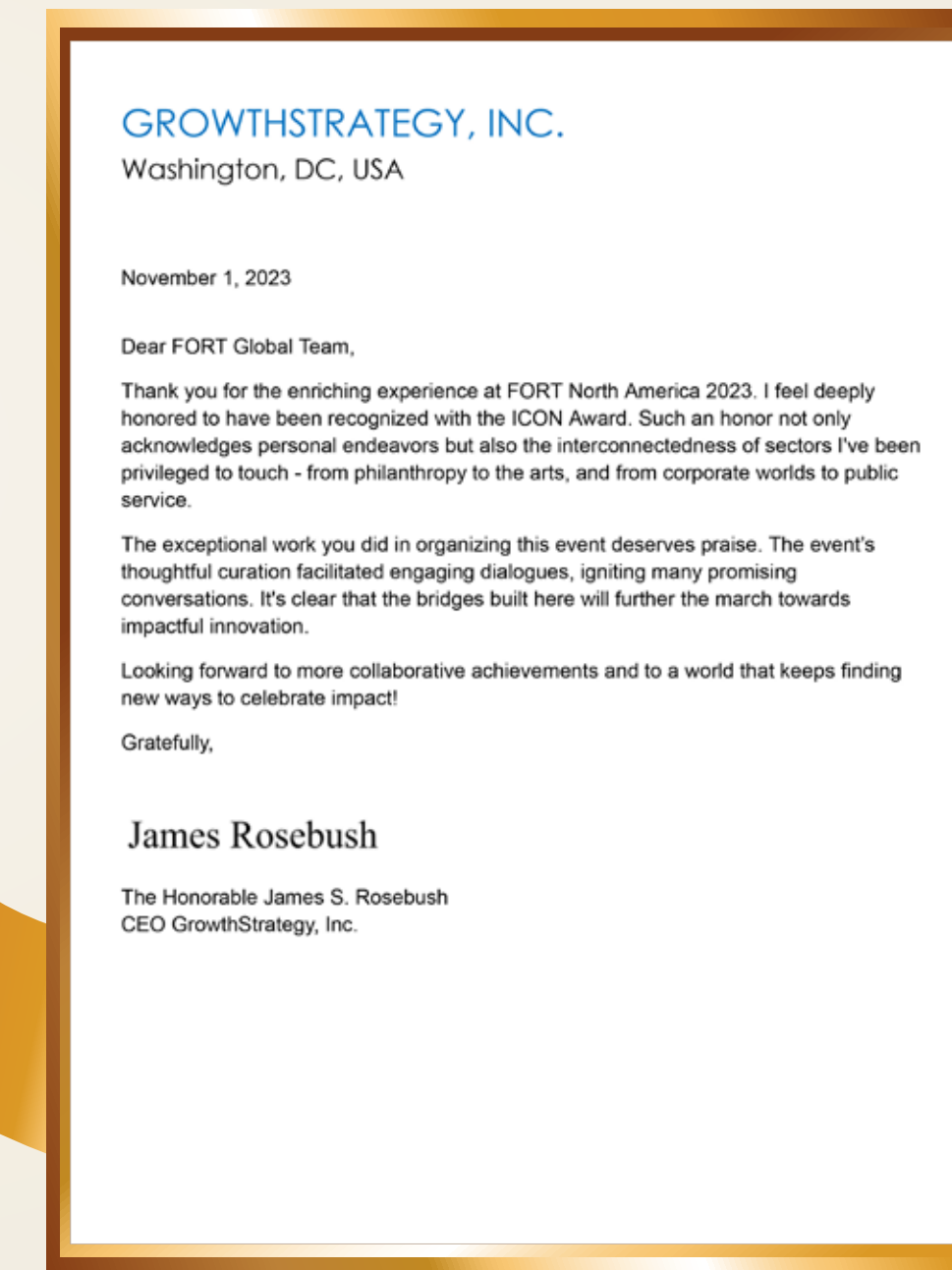
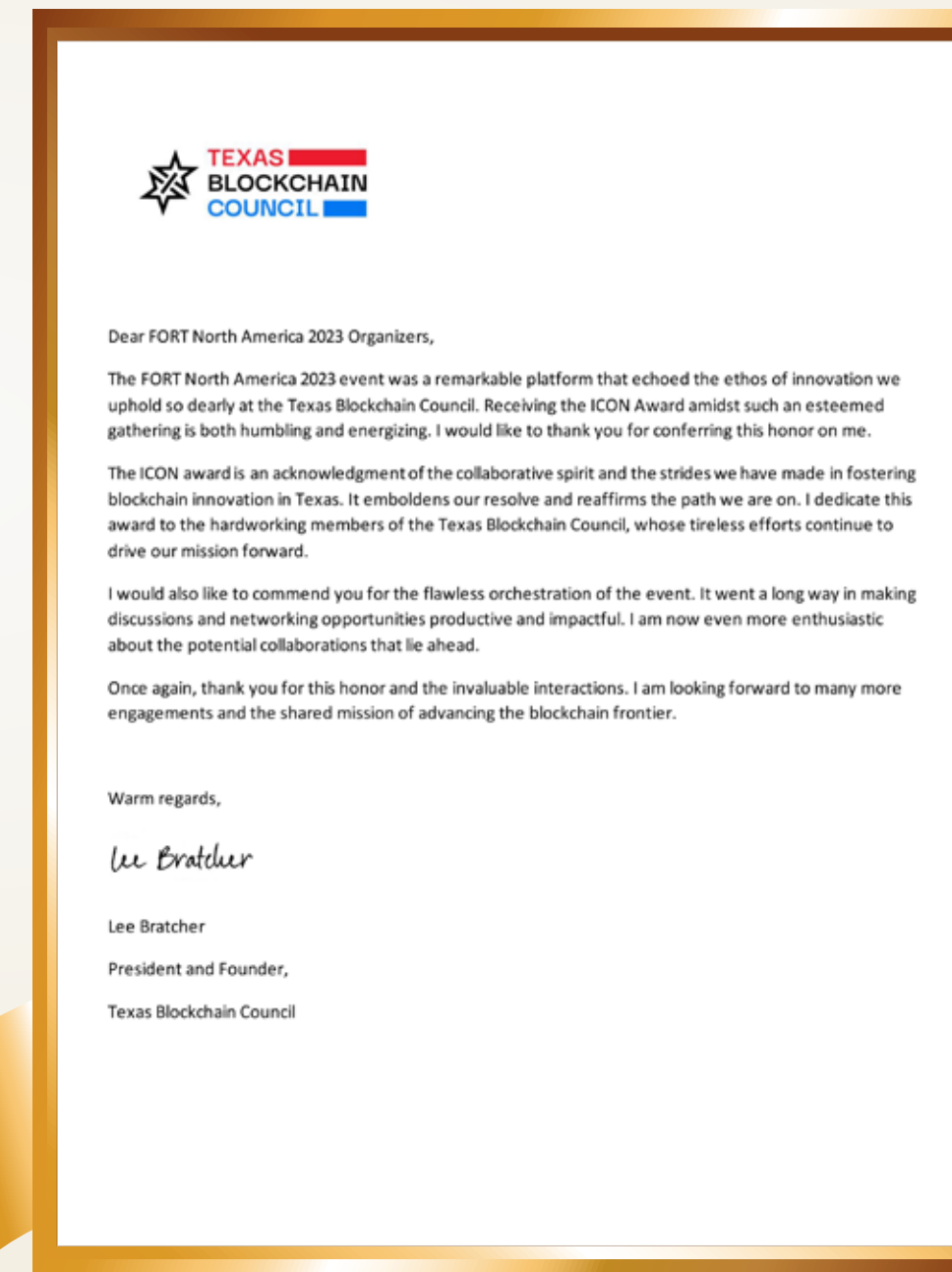
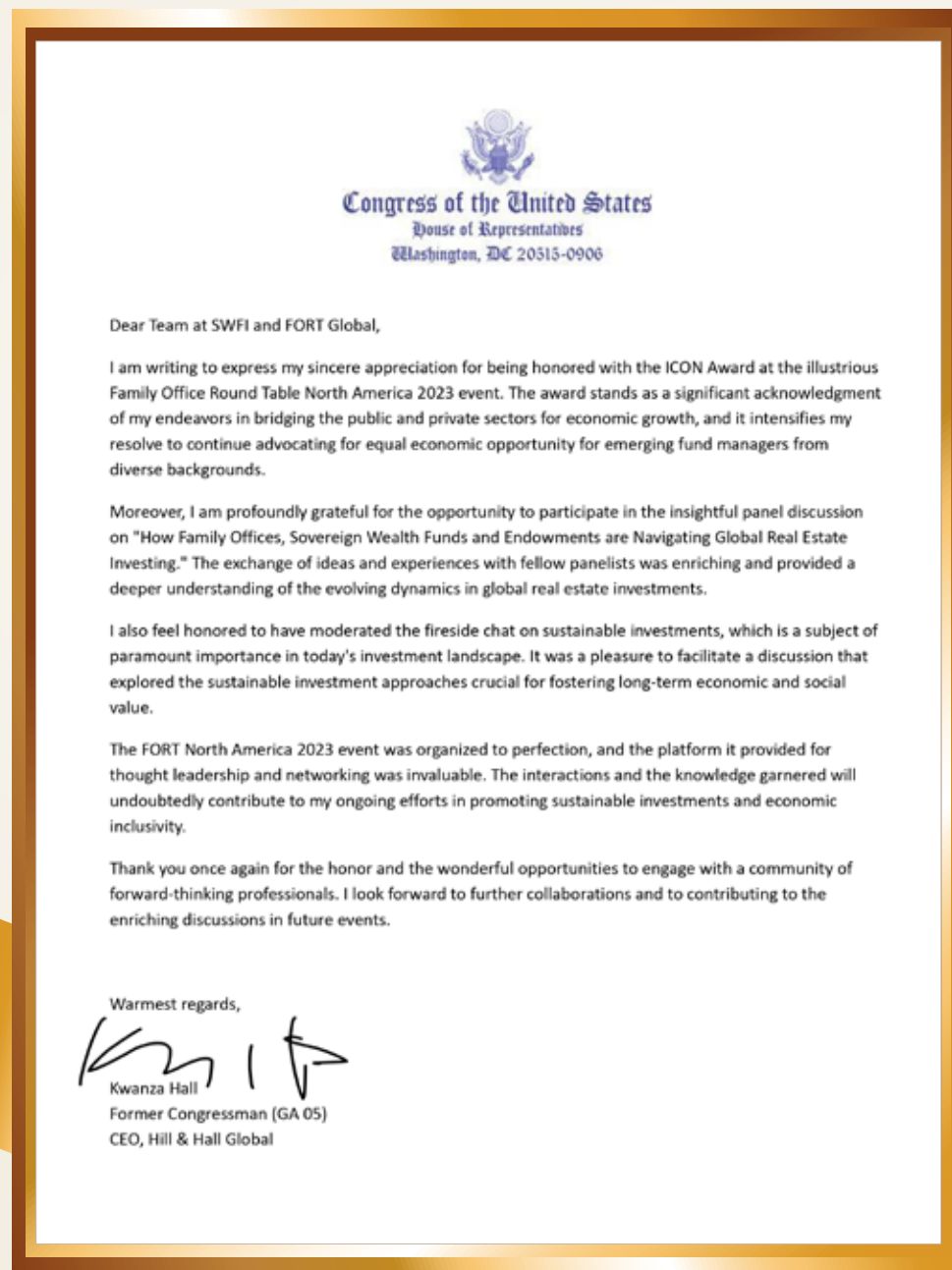
IEE BRATCHER

President and Founder, Texas Blockchain Council



THE HONOURABLE JAMES S. ROSEBUSH

CEO, GrowthStrategy, Inc.





From L to R: Dr. Ana Nacvalovaite, Kim Diamond, Stella Yin, Bonnie-Jill Laflin, Dr. Maha Achur, Dipika Patel, Santia Barnes

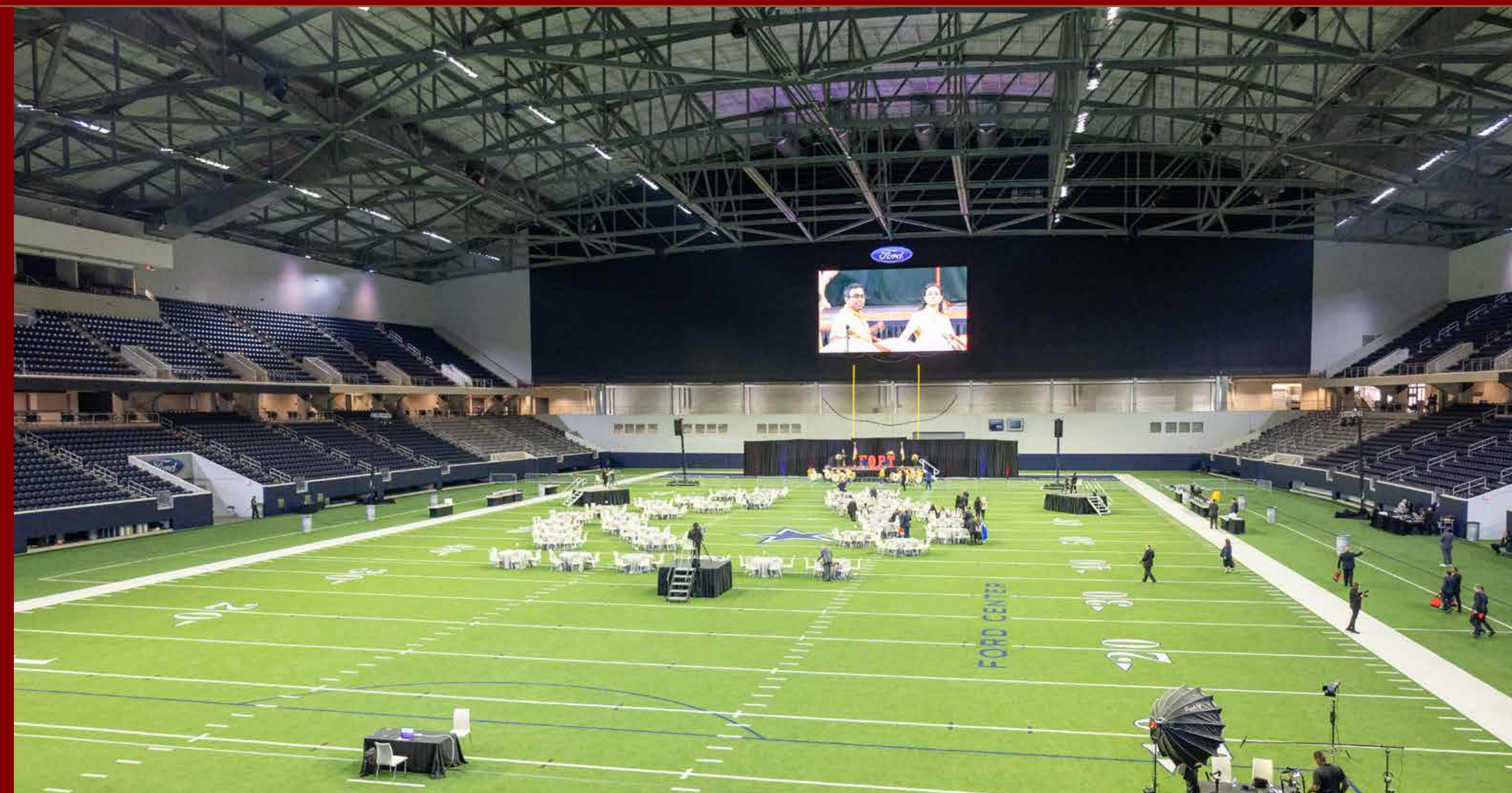


From R to L: Edward Longhurst-Pierce, John Harrington III, Ranu Vohra, Kwanza Hall, Hon. James Rosebush, H.E. Udaya Indrarathna, Lee Bratcher, Merin Rajadurai



THE STAR AS THE VENUE FOR FORT NORTH AMERICA 2023

The Star in Frisco, Texas, is not just the global headquarters for the Dallas Cowboys but also a hub for business and community engagement. This made it an ideal location for the Family Office Round Table (FORT) North America 2023. The Cowboys lent the venue its iconic status in American football, and The Star extends this influence into areas that align with FORT's mission, such as public and private wealth management.



ARCHITECTURAL INNOVATION AT THE STAR

The architecture of The Star is a harmonious blend of innovation and functionality. The venue is designed to facilitate more than just athletic activities; it's equipped with spaces that encourage intellectual and social interactions. Meeting rooms, auditoriums, and open spaces are all crafted to foster dialogue and collaboration, which are essential for the round table discussions that FORT aims to conduct.



THE EXPERIENCE FOR ATTENDEES

Attendees at The Star can expect a unique experience that goes beyond the round table discussions. The venue itself served as an additional layer to the event's agenda. Features like outdoor athletic fields and a state-of-the-art sports medicine center didn't just enrich the venue but also provided a backdrop that subtly complements discussions on public and private wealth, serving as the metaphors for teamwork, strategy, and high performance in the financial sector.



ALIGNING WITH FORT'S OBJECTIVES

The Star stands as a venue that aligns well with the core objectives of FORT North America 2023. Its modern amenities and design elements set the stage for focused yet comfortable dialogue among experts in wealth management. As FORT is committed to hosting its events in locations that hold the highest level of importance or an iconic status, The Star fulfills this criterion, promising a productive event for all attendees.

PICTORIAL CHRONICLE OF DAY ONE AT FORT NORTH AMERICA



Delegates at the FORT North America 2023 Event



Welcome Remarks by Edward Longhurst-Pierce



SWFI Journey by Michael Maduell



Joint Photograph With Good Fellow Awardees



Networking Session



Dinner At The Grand Atrium Hall Of Fame



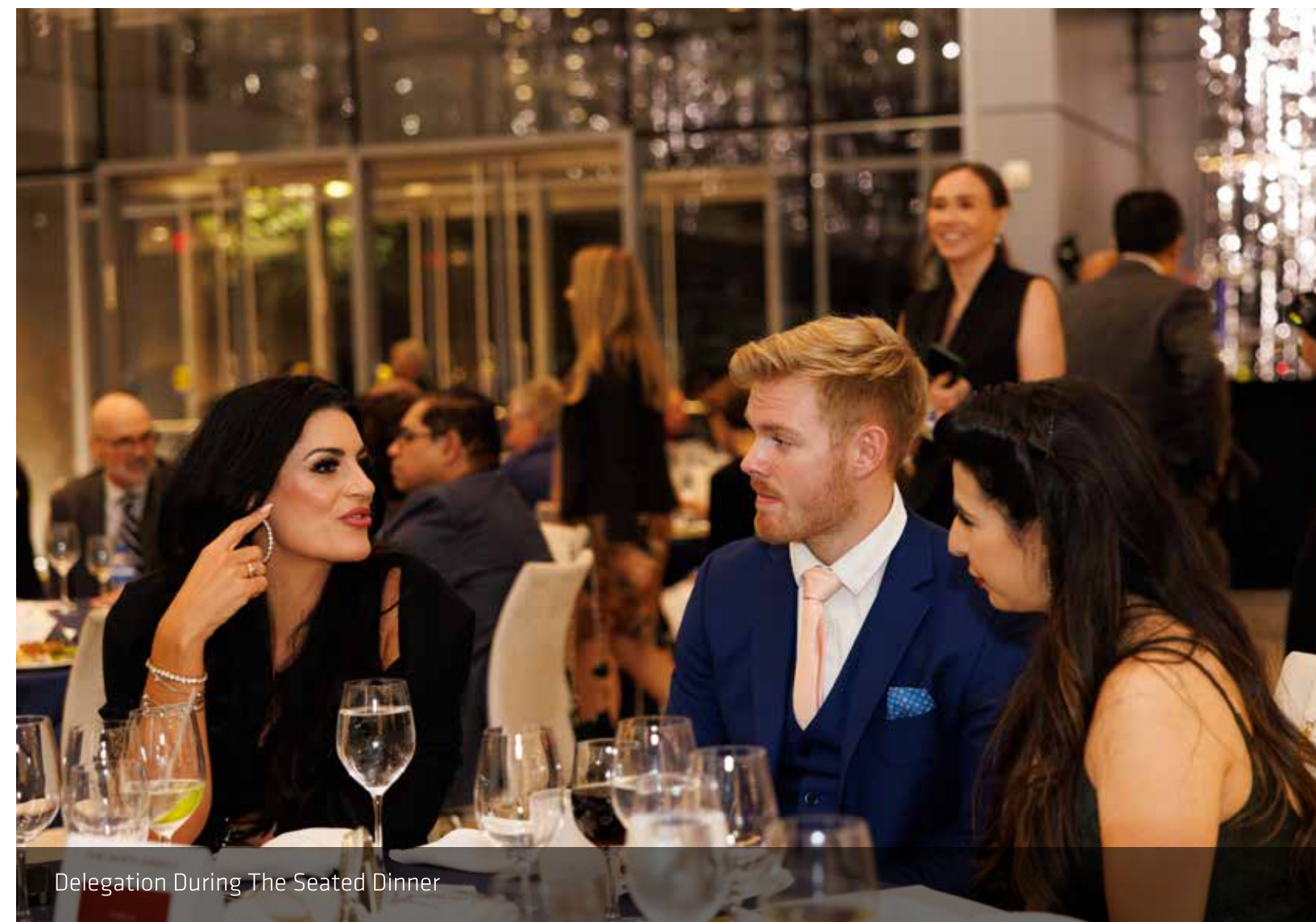
Delegates At Dallas Cowboy Stadium



Arjun Prasad And Dr. Siddeek Ahmed



Delegation during the seated dinner

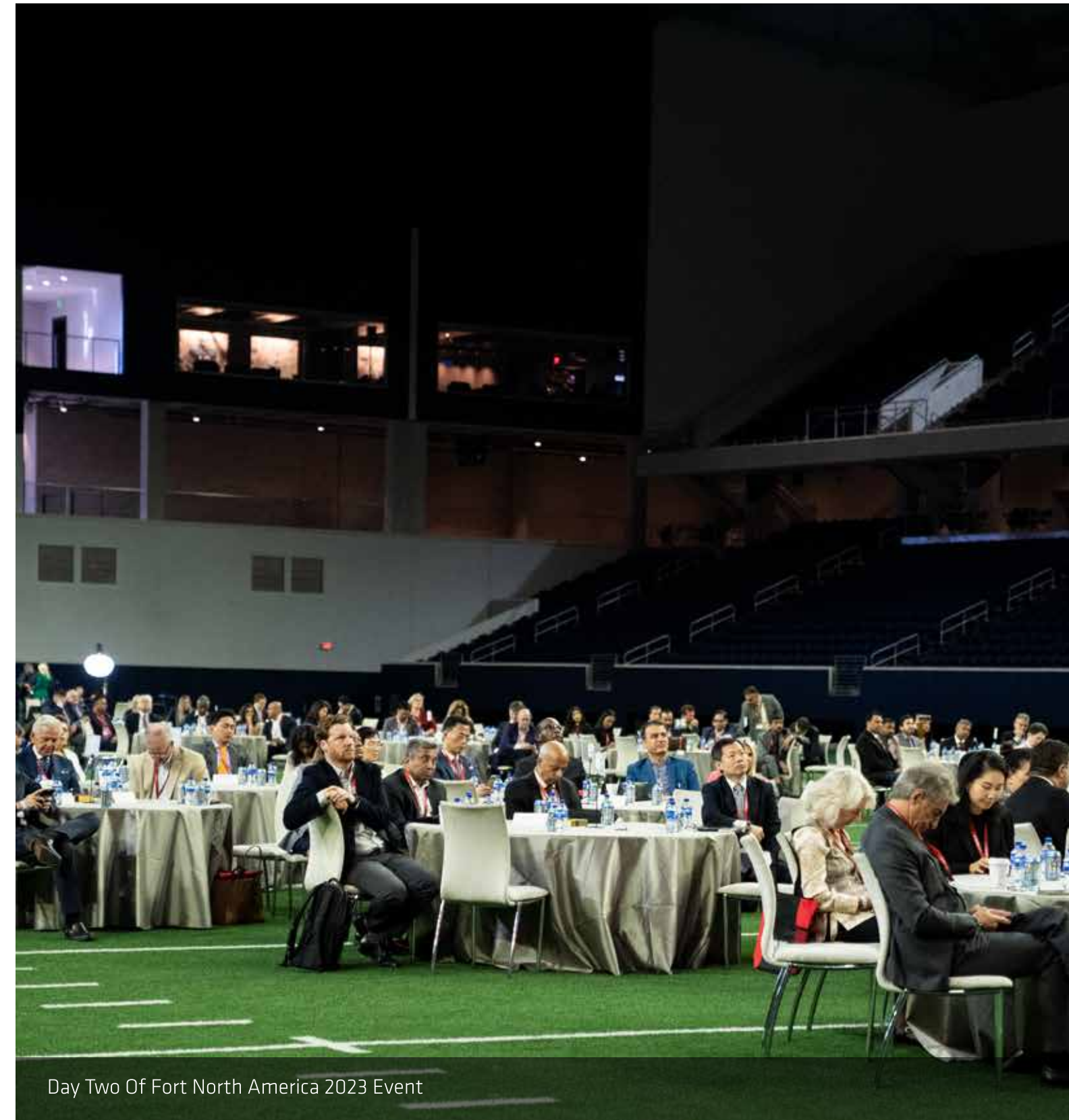


Delegation During The Seated Dinner



Group Photo At The End Of The Day One

PICTORIAL CHRONICLE OF DAY TWO AT FORT NA



Day Two Of Fort North America 2023 Event



Opening Remarks By Edward Longhurst-Pierce



ICON Award Winners



Panel Discussion At Day Two Of Fort North America 2023 Event



Benjamin Page-fort, Anand Chandrasekaran And Candice Beaumont



Scott Werbel And Dipika Patel



Dr. Maha Achour, Max Li, Peter Knez And Uri Ferruccio



Honorable James Rosebush And Farzam Kamalabadi



The Star Global Headquarters Of The Dallas Cowboys





VICTORIA KENNEDY

Victoria Kennedy left an indelible mark at FORT NA 2023 with her musical performances, opening the first evening with "Parla Piu Piano" and earning a standing ovation for her operatic rendition of "Imagine." On the second day, she performed a classical version of "Country Roads" at the Cowboy's stadium. Beyond the stage, Victoria is a Wall Street Journal best-selling author, TEDx speaker, and journalist with expertise in Web3, crypto, NFTs, and the metaverse. A member of the Rolling Stone Culture Council and the Forbes Agency Council, she's also a trusted consultant for Web3 Projects and top Inc. 5000 companies. Her insights have been featured in over 200 publications, and her rendition of "O Mio Babbino Caro" has topped the iTunes Classical Charts.



JOSEPH KUIPERS

Joseph Kuipers showcased his musical range at FORT NA 2023, captivating the audience with performances of JS Bach's Suite and his own composition "to L. Cohen," as well as a rendition of Mancini's "Moon River." Known for his versatility, Joseph has graced the stages of global festivals like Ravinia and Aspen and collaborated with renowned composers such as Heinz Holliger and Arvo Part. He's performed with top ensembles like the Miró and Dover Quartets and is a committed educator with a successful private teaching studio in North Dallas. In 2020, he founded TEXAS CELLOS™, a nonprofit for building a cello community, and is the creative force behind the MUSIC@MILL Music Festival™ and the upcoming Texas Cello Grand Prix International Competition 2024. Beyond music, Joseph is a composer, painter, and outdoorsman, often exploring nature with his Australian Shepherd, Yelka.



Solo Performance By Victoria Kennedy



Joseph Kuiper's Cello Performance

PANEL DISCUSSIONS

EPIC CONVERSATIONS

FORT North America 2023 served as a platform for influential industry leaders to delve into crucial topics shaping the landscape of finance and investment. The discussions were comprehensive and touched upon various significant areas private equity, co-investment, global real estate, sovereign wealth funds, and the role of AI in finance.

By deep-diving into these topics, the respected speakers provided a comprehensive understanding of the current state of the finance industry, offering insights and strategies to navigate challenges and capitalize on emerging opportunities. The panel discussions fostered networking opportunities, allowing participants to connect with peers, share experiences, and build collaborations.



PRESERVING LEGACY, PROMOTING PROSPERITY



NORTH AMERICA 2023





PANEL 1:

PRIVATE EQUITY TRENDS AND OPPORTUNITIES FOR 2023 AND BEYOND

This panel delved into the increasingly important relationship between private equity and family offices. As family offices are increasingly turning to private equity for its benefits in diversification and growth, the panel offered a comprehensive look at the unique challenges and opportunities that arise. The discussion, featuring experts from both the private equity sector and family offices, covered strategies for successful investment, managing risk for growth, and how to ensure these investments align with the larger objectives of family offices.

PANEL MEMBERS:



THOMAS BRIGANDI
Managing Director,
RisCura



BENJAMIN PAGE-FORT
Director of Global Solution Marketing,
SimCorp



BRYAN HEDRICK
Portfolio Manager,
Retirement Funds



ANAND CHANDRASEKARAN
General Partner,
General Catalyst



CANDICE BEAUMONT
Chairman,
Salsano Group





PANEL 2:

CAPITAL CONVERGENCE: FAMILY OFFICE DEAL FLOW AND INSTITUTIONAL CO-INVESTMENT LANDSCAPE

The panel focused on the evolving landscape of collaborative investing, particularly between family offices and institutional investors like sovereign wealth funds. With an emphasis on unique avenues for investment, cost-effective solutions, and diversified strategies, the panelists led a rich dialogue on the core elements of joint investment initiatives. The conversation also touched on how to build valuable relationships and leverage collective expertise for better financial returns.

PANEL MEMBERS:



ROB CURRAN
Editor,
Wall Street Journal



ANYA SCHIESS
Co-Managing Partner, Life Science
Private Capital a division of
J.P. Morgan Global Alternatives in
J.P. Morgan Asset Management



ILIAS GEORGOPOULOS
Group Head of Private and Institutional
Asset Owners,
IQ-EQ

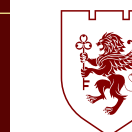


CHRISTIAN K. WINKLER
Managing Partner,
ASC Impact + Evergryn Ventures AG



CHRISTINA WING
Founder,
Wingspan Legacy Partners





PANEL 3:

HOW ARE FAMILY OFFICES, SOVEREIGN WEALTH FUNDS, AND ENDOWMENTS NAVIGATING GLOBAL REAL ESTATE INVESTING?

The panel addressed the complexities that family offices, sovereign wealth funds, and endowments face in the realm of real estate investing. With the emergence of new challenges like commercial real estate debt and shifts in workforce behavior, the discussion explored how family offices are adapting their strategies. The panelists, including real estate professionals and representatives from established family offices and funds, examined both traditional and modern investment methods like asset-backed tokens and structured financial instruments.

PANEL MEMBERS:



KIM DIAMOND
Co-Founder & CEO,
Land Global



DR. GLENN R. MUELLER
Professor, Burns School of Real Estate
& Construction Management,
University of Denver



RICHARD SQUIRES
Founder,
Lennox Capital Partners, LP



DIPTIK PATEL
CEO/CIO,
Patel Family Office



KWANZA HALL
Congressman,
Hill and Hall Global



SCOTT WERBEL
Managing Director,
The Ardent Companies





PANEL 4:

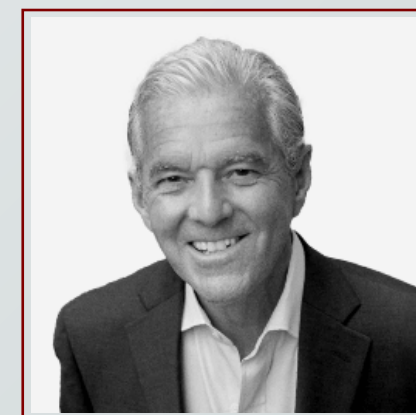
LUNCH-ON DISCUSSION, FAMILY OFFICES, SUSTAINABILITY, IMPACT INVESTING AND PHILANTHROPY:

The panel looked at the role of Sovereign Wealth Funds in shaping global financial trends. By aligning their goals with those of local businesses, these funds can have a broader economic impact. The discussion focused on fostering entrepreneurial environments, creating innovative solutions, and setting a course for long-term economic prosperity.

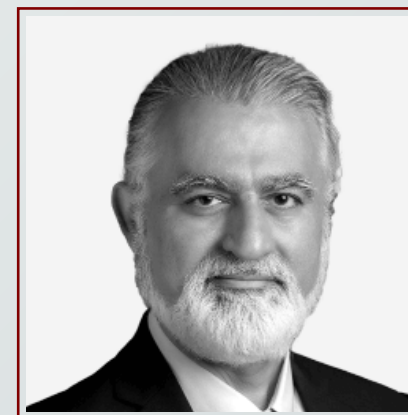
PANEL MEMBERS:



LEE BRATCHER
President and Founder,
Texas Blockchain Council



HONORABLE JAMES BUSH
CEO,
GrowthStrategy, Inc.

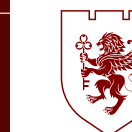


FARZAN KAMALABADI
Founder & Chairman,
Future Trends Group



MINA IU
CEO,
Victoria's Voice Foundation





PANEL 5:

AI IN FINANCE: THE FUTURE OUTLOOK

Artificial Intelligence (AI) is transforming the financial sector, revolutionizing how banks, financial institutions and investors operate. This panel explored the intersection of investments, finance, AI, ethics, and future forecasts. The panel comprised experts from the innovation side and allocators in the AI field.

PANEL MEMBERS:



MICHAEL MADUELL
CEO,
Sovereign Wealth Fund Institute



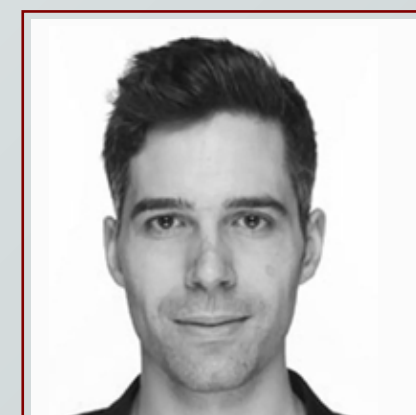
DR. MAHA ACHOUR
Venture Partner,
Chakra Fund



MAX IL
Founder & CEO,
OORT



PETER KNEZ
Founder,
Kenz Ventures



URI FERPUCCIO
CEO,
Concordia



UCHE ORJI
Co-Founder/Partner
Titangate Captial Management



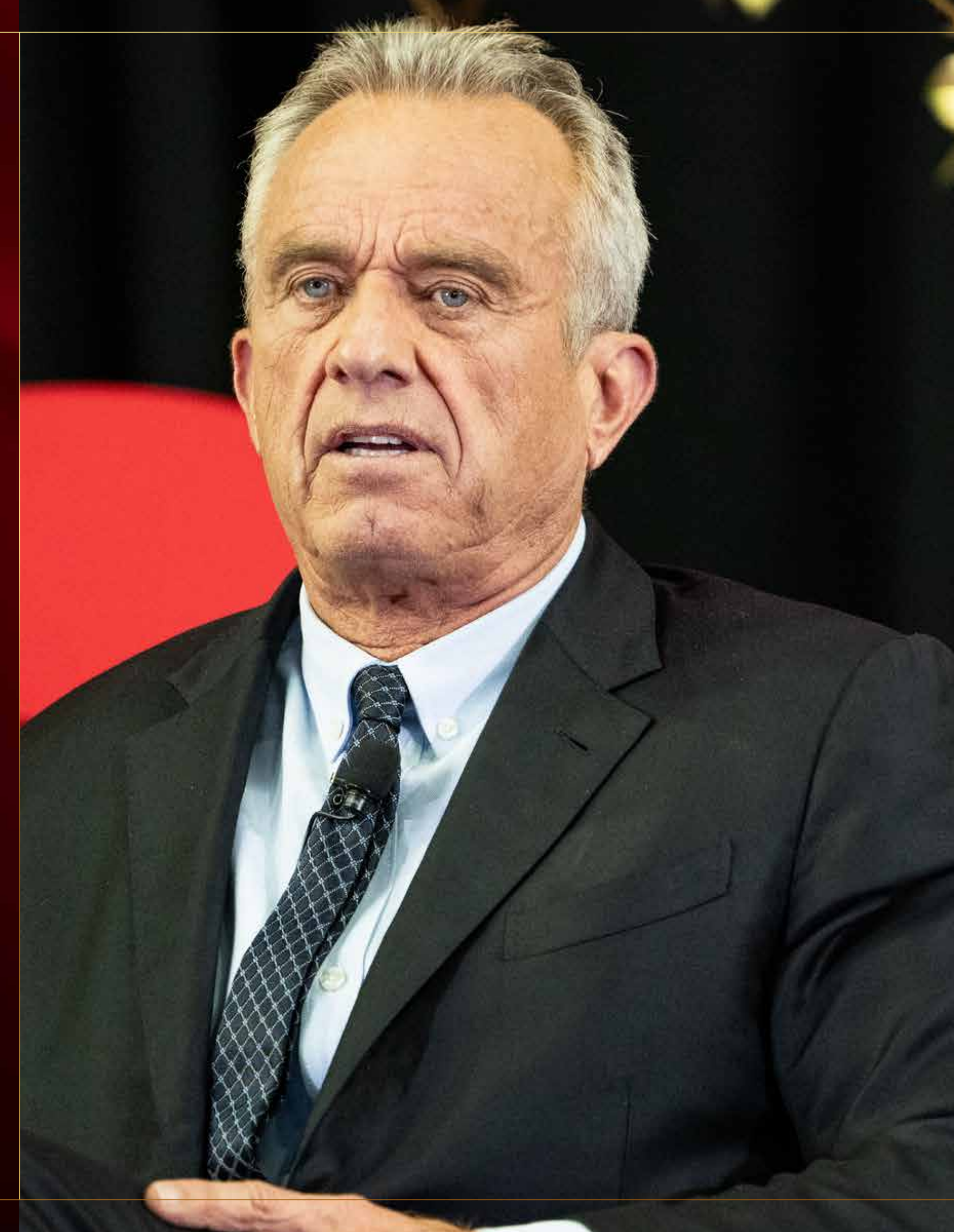
FIRESIDE CHAT WITH ROBERT F. KENNEDY

REIMAGINING THE AMERICAN DREAM

Robert F. Kennedy Jr., a distinguished environmental lawyer and advocate, took to the stage not just as a member of the iconic Kennedy family, but as a thought leader in his own right. In a fireside chat that was both a nod to tradition and a glimpse into the future, he outlined a presidential platform that is as comprehensive as it is compelling. Leveraging alternative media platforms, Kennedy aims to engage an electorate that's increasingly skeptical of conventional political discourse.

He delved into the pressing issues plaguing modern America: the escalating housing crisis, the erosion of the middle class, and the labyrinthine healthcare system. Far from offering mere platitudes, Kennedy pledged actionable, pragmatic policies—sustainable housing initiatives, economic reforms, and an accessible healthcare model.

His vision weaves together the threads of environmental stewardship, social justice, and transparent governance, offering a multi-faceted approach to not just restoring but reimagining the American Dream for a new era.



PRESERVING LEGACY, PROMOTING PROSPERITY



NORTH AMERICA 2023





ENTREPRENEURIAL PITCHES AT FORT NORTH AMERICA

PITCHING TOMORROW'S
SUCCESS STORIES

ARBT

This Australian technology firm has revolutionized housing by combining off-site construction with advanced manufacturing. Over eight years, they've significantly reduced on-site construction time while improving quality and affordability. Their innovative approach has set new industry standards for efficient and sustainable construction.

LEDGERFUNDING, INC.

Founded by Ling W. Chang, LedgerFunding addresses the \$2.5 trillion global trade funding gap through a funder-agnostic platform. Utilizing Distributed Ledger Technology, the company democratizes access to working capital and trade finance solutions. Ling's extensive experience in tech leadership adds a layer of credibility and vision to the company's ambitious goals.

BANDIT TRUCK

Born from a passion for cars and inspired by a pivotal meeting with Burt Reynolds, Bandit Truck made a splash with its inaugural vehicle at SEMA 2021. Handling everything from design to sales in-house, the company has carved a unique niche in the automotive world. Further elevating its profile, Bandit Truck was the focus of a 6-episode TV series - Jere and the Bandit, showcasing not just the brand but also the values of community and philanthropy.

PRAETORIAN GLOBAL

Utilizing a unique non-plant-touching business model, Praetorian Global owns a wealth of intellectual property, including brands, genetics, and trade secrets. This IP-centric approach allows for rapid and efficient market expansion with minimal capital deployment. The company boasts an award-winning portfolio of 240+ SKUs and 2,000+ genetic cultivars, backed by high-profile licensees such as DIAGEO and WMH. With a presence in multiple states and countries, Praetorian Global has established itself as a key player in the cannabis industry.

SPEAKERS



Dr. Maha Achour
Venture Partner, Chakra Fund

Maha Achour has a 25-year track record in the semiconductor, wireless RF, and defense industries. She has held leadership roles in both startups and public companies. She made Forbes' "50 Over 50 - Vision" list, which speaks to her leadership and business skills. She founded Metawave and has also served in key roles at companies like Polyceed-Dynamics and Rayspan. She was a Director of Advanced Technology at Boeing's SDRC. Maha is a frequent speaker at industry events and holds a doctorate in Physics from MIT. She has authored over 35 publications and holds more than 90 patents.



Rini Basiron
Consultant, ARBT Property Group

Rini Basiron has 14 years of banking and finance experience, with top 4 banks in Australia. She specialized in International Trade for sectors like Property, Mining, and Oil and Gas. Rini is certified in Blockchain Technology and has a keen interest in disruptive technologies. She recently moved to the UAE to work on Web 3 projects. Her expertise spans across banking, finance, macroeconomics, and investments.



Rob Curran
Editor, The Wall Street Journal

Rob Curran has carved out a significant career in financial journalism, currently serving as an editor at The Wall Street Journal. In addition to his primary role, he contributes columns to The Dallas Morning News, expanding his influence in the media landscape. His work has also appeared in Fortune Magazine and Dow Jones Newswires, showcasing his versatility and depth in financial reporting. Alongside anthropologist Andrew Nelson, he co-authored "Journey Without End: Migration from the Global South through the Americas," a book that delves into the complexities of global migration patterns.



Jacques Demers
Chairman & Co-Founder, AGAWA Partners

With an impressive 45-year career spanning investment, law, and pensions, Jacques Demers stands as a seasoned professional in both Canadian and global markets. He co-founded AGAWA Partners and recently completed a four-year term chairing York University's Investment Committee and Pension Fund Board. His investment acumen is evident; he's been an active investor since 1987, with notable early-stage investments in various sectors. Jacques served as a Senior Executive at the Ontario Municipal Employees Retirement System (OMERS) from 2008 to 2015, where he managed \$3.5 billion in private assets. His leadership also extended to pioneering corporate and project financings in North America and abroad.



Candice Beaumont
Chairman, Salsano Group

Candice Beaumont is the Chairman of Salsano Group, a Panama-based family office. She also serves as the Chief Investment Officer of L Investments. She is responsible for capital allocation across various investment portfolios. Candice has spoken at numerous investment conferences and serves on several boards, including Clean Earth Acquisition Corp and Israel Acquisitions Corp. She is also an Advisory Board member of the Family Office Association.



Lee Bratcher
President and Founder, The Texas Blockchain Council

Lee Bratcher founded the Texas Blockchain Council, an association aiming to make Texas a hub for Bitcoin and blockchain innovation. The Council has successfully influenced legislation in Texas, with Lee playing a key role. He also serves as a Captain in the US Army Reserves and was a political science professor at Dallas Baptist University. Lee is a Ph.D. candidate at UT Dallas, focusing on blockchain land registries.



Kim Diamond
Co-Founder & CEO, Land Global

Kim Diamond brings over 30 years of experience in commercial real estate, structured finance, and debt capital markets. She has held pivotal leadership roles, including Managing Director at S&P's Commercial Mortgage Ratings Group and Senior Managing Director at Kroll Bond Rating Agency. As a Founding Principal at Crescit Capital Strategies, she demonstrated her expertise in middle-market commercial real estate debt lending. Kim serves on the board of the Commercial Real Estate Finance Council and BrightSpire Capital, contributing her extensive knowledge to these organizations.



Uri Ferruccio
CEO, Concordia

Uri Ferruccio is an entrepreneur, investor, and board advisor with a focus on technologies that are critical for the future. He co-founded and currently serves as the CEO of Concordia, a venture-backed modular risk management platform. Before Concordia, he was Vice President for Business Development at Binance and Director of Strategy at JD AI. His roles have always centered around emerging technologies and their social impact. Uri holds multiple degrees, including a BA from the University of North Carolina, an AM from Harvard, and an MFA from New York University.



Thomas Brigandi
Managing Director, RisCura

Thomas Brigandi is a Managing Director at RisCura, a consultancy overseeing more than \$200 billion in emerging and frontier markets. Before RisCura, he worked at Moody's Investors Service and the NYC Pension Fund. Thomas is also Chair of the Board of Directors of CFA Society New York and has organized numerous CFA Society conferences. He holds a Bachelor of Science from the Macaulay Honors College at the City University of New York.



Anand Chandrasekaran
General Partner, General Catalyst

Anand Chandrasekaran grew up in India and moved to Silicon Valley to pursue electrical engineering at Stanford. He founded a software company that survived the dot-com bubble and was later acquired. Anand has invested in more than 80 startups and focuses on long-term partnerships. He has served as CPO at companies like Five9, Bharti Airtel, and Snapdeal. He joined General Catalyst to invest in solutions for healthcare, climate change, and social equity.



Ilias Georgopoulos
Group Head of Private and Institutional Asset Owners, IQ-EQ

Ilias Georgopoulos has a rich career spanning 27 years in the financial services sector. As the Group Head of Private and Institutional Asset Owners at IQ-EQ, he drives the company's strategy and client relationship model. He has held regulated senior leadership roles since 2007, with responsibilities across the U.S., EMEA, and APAC. Most recently, he served as the CEO of Credit Suisse's 3rd party IFM in Luxembourg. Before that, he was the Global Head of Relationship Management at Alter Domus. Ilias began his career at State Street and later moved into the family maritime brokerage business in Athens, Greece.



Leanna Haakons
Founder, Black Hawk Financial

Leanna Haakons is a financial and marketing expert with over 15 years of experience. She founded Black Hawk Financial in 2014, a consultancy specializing in business development, marketing, and investor relations. Known as "the Hawk," Leanna has a diverse educational background, including a business degree and further studies in Journalism at Harvard and Private Capital Markets at Pepperdine. She authored the best-selling book "Young, Fun & Financially Free," aimed at demystifying finances. Leanna has been featured in media outlets like CNBC's Squawk Box, Bloomberg ETF IQ, and Yahoo Finance. She has also moderated and hosted numerous global investment conferences and panels.



Kwanza Hall

Congressman, Hill and Hall Global

Kwanza Hall is a seasoned public servant who was on the Atlanta City Council and School Board for 15 years, focusing on economic inclusion, workforce development, and urban design. Hall has been recognized by the W.K. Kellogg Foundation, for his initiatives to uplift impoverished communities. He also served briefly as a U.S. Representative, completing the late Congressman John Lewis' term. During this period, he introduced legislation and advocated for over \$3 trillion in various budgets. Hall has been honored with the Pioneer Award from Georgia State University and the Kwanza Hall Award for civic leadership in architectural design.



Robert F. Kennedy, Jr.

US Presidential Candidate 2024

Robert F. Kennedy, Jr. is a key figure in environmental law and activism. He's the nephew of John F. Kennedy and son of Robert F. Kennedy, both of whom were assassinated. Kennedy chose a different path, focusing on environmental causes and children's welfare. He founded Waterkeeper Alliance, a leading clean water advocacy group, and later established Children's Health Defense. Educated at Harvard, the London School of Economics, and the University of Virginia Law School, Kennedy has also taught at Pace University School of Law for over 30 years. He is married to actress Cheryl Hines and has seven children.



Victoria Kennedy

CEO, Victorious PR

Victoria Kennedy is a Wall Street Journal best-selling author, TEDx speaker, and journalist. Her TEDx talk on self-reinvention has garnered international attention. She is a member of the Rolling Stone Culture Council and the Forbes Agency Council. Known for her expertise in Web3, crypto, and NFTs, Victoria is a sought-after speaker and consultant. She also has a background in real estate and technology. As a classical singer, she has topped the iTunes Classical Charts. Her work has been featured in over 200 publications.



Dr. Ana Nacvalovaite

Research Fellow, Kellogg College

Dr. Ana Nacvalovaite is a Research Fellow at Oxford University's Kellogg College Centre for Mutual & Co-owned Business. Her doctoral degree from Oxford focused on ethical business and investment practices, particularly in the realm of regulation, sustainability, and transparency of investments of sovereign wealth funds. She serves as an expert advisor to the British Standards Institution on their Committee of Experts on Sustainable Finance. Ana has been instrumental in drafting and reviewing International Standards on Green Instruments. Currently, she is advocating for the importance of a 'just transition,' emphasizing the role of sustainable finance in supporting the 'S' in ESG (Environmental, Social, Governance).



Jeff Hoffman

Founder - World Youth Horizons

Jeff Hoffman is a renowned entrepreneur, CEO, and motivational speaker. He is known for founding multiple startups including Priceline.com and uBid.com. Jeff is a bestselling author, and film producer, and has produced award-winning music and TV shows. He stars in and produces the TV series "COINC PUBLIC," where viewers can invest in startups. As Chairman of the Global Entrepreneurship Network, he supports entrepreneurs in 200 countries and is a founding board member of The Unreasonable Group, impacting over a billion lives. Jeff also contributes to global entrepreneurship education with CEED Global and advises on economic growth initiatives for organizations like the White House and the United Nations.



Bryan M. Hedrick, CFA, CAIA

Portfolio Manager, Retirement Funds

Bryan M. Hedrick is a Portfolio Manager responsible for managing diversified retirement funds at the Dallas Fort Worth International Airport. He has over eight years of experience at the \$2.4 billion Fort Worth Employees Retirement Fund and six years with investment firms like Morgan Stanley, TD Waterhouse, and JP Morgan Chase. Bryan holds multiple degrees and certifications, including a Bachelor's Degree in Finance from Oklahoma State University, an MBA from Texas Christian University, and an MSA from Texas A&M University-Commerce. He is also an Adjunct Professor of Finance at the TCU Neeley School of Business.



PETER KNEZ

Founder, Knez Ventures

Peter Knez is a former Chief Investment Officer at Blackrock and Barclays Global Investors. At BGI, he grew AUM from \$5 billion to \$80 billion globally. He has also held academic positions at the Kellogg School of Management, the University of Wisconsin, and the University of Chicago. Currently, he chairs Venom Foundation and ALLINDEX and advises multiple fintech and AI platforms. He completed his PhD work at the Wharton School of the University of Pennsylvania.



Mina Lu

CEO, Victoria's Voice Foundation

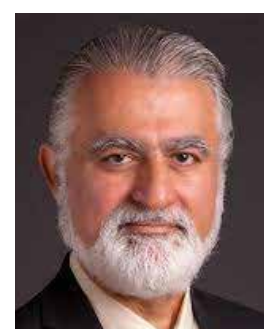
Mina Lu is the CEO of the Victoria Siegel Foundation and Victoria's Voice. She has led the foundation's strategic partnerships and program development. As a serial entrepreneur and former Executive Producer of hit shows, Mina has leveraged media for prevention messaging. The foundation's programs have reached over 800,000 families in just three years. Mina has also secured partnerships with major corporations and government agencies, focusing on the distribution of Naloxone, the antidote to a drug overdose.



H.E. Udaya Indrarathna

Sri Lankan Ambassador to the United Arab Emirates

His Excellency Udaya Indrarathna is a strategic catalyst with over 25 years of experience in executive positions within the government and global corporations. He is a recipient of the 2023 GOOD Fellow Award for his contributions to global wealth creation. Udaya is a sought-after keynote speaker and panelist at global events. He has also authored a book exploring the UAE's leadership principles. His strategic acumen is evident in Sri Lanka's Economic Blueprint for 2024-2030, which he masterminded. Beyond his corporate achievements, Udaya has been instrumental in shaping Sri Lanka's social and economic landscape, mentoring over 30 aspiring CEOs in the country.



Farzam Kamalabadi

Founder & Chairman, Future Trends Group

Farzam Kamalabadi is a global strategist with high-level relations with national leaders of around 100 countries. He is particularly influential in China, where he is known as "The Most Influential Foreign Figure in Modern China History." He has served as Senior Economic Advisor to over 20 municipal and regional governments in China and has masterminded several rounds of national policy. In the oil & gas sector, he has served as Senior Advisor to countries like Oman, Kuwait, and China. In the blockchain sector, he serves as a senior partner in several companies.



Michael J. Maduell

President, Sovereign Wealth Fund Institute (SWFI)

Michael J. Maduell is the President and Founder of the Sovereign Wealth Fund Institute (SWFI). Under his leadership, SWFI has gained global reach and prestige. He is credited with bringing attention to sovereign wealth funds and public pensions. Michael co-invented the Linaburg-Maduell Transparency Index, a method for rating transparency in sovereign wealth funds. His research has been cited in academic papers and media outlets, and he has appeared on channels like CNBC, CNN, and Bloomberg. He holds a Master's in Investment Management and Financial Analysis from Saint Mary's College and a Bachelor's in Finance and Risk Management from California State University, Sacramento.



Glenn R. Mueller, Ph.D.

Professor at the University of Denver

Glenn R. Mueller is a seasoned academic and industry expert with nearly half a century of experience in real estate. He serves as a professor at the University of Denver's Burns School of Real Estate & Construction Management. Mueller is internationally recognized for his pioneering work on Market Cycle research concerning income-producing real estate. His research has been a cornerstone for investors and policymakers alike. Over the years, he has held top research positions at reputable firms such as Black Creek Group, Legg Mason Inc., Price WaterhouseCoopers, and Prudential Real Estate Investors.



Uche Orji

Co-Founder/Partner, Titangate Capital Management

Uche Orji is a seasoned investor with over 30 years of global experience, including in-depth sector experience in Industrials, technology, semiconductor, and chemical sectors. He is the co-founder of Titangate Capital Management, a European Growth Equity Fund. Orji also serves as a member of the European Union Commission High-Level Expert Group for mobilizing capital for lower- and middle-income countries. He is a Non-Executive Director and Chair of the Board Risk Committee of the Private Infrastructure Development Group (PIDG).



The Honorable James S. Rosebush

CEO, GrowthStrategy, Inc.

James S. Rosebush is a multifaceted leader with experience in corporate, family office, and philanthropic organizations. He is the CEO of GrowthStrategy, Inc., an international advisory firm. Rosebush has authored best-selling books, including "WINNING YOUR AUDIENCE: Speak with The Authority of a President" and "TRUE REAGAN: What Made Ronald Reagan Great and Why It Matters." In the White House, Rosebush was President Reagan's "point man" on philanthropy and public-private partnerships. His extensive experience in philanthropy and public service makes him a well-respected figure in various sectors.



Anya Schiess

Co-Managing Partner, Life Science Private Capital

Anya Schiess is the Co-Managing Partner of Life Science Private Capital within J.P. Morgan Private Capital. She joined the firm in 2022 and co-manages the LSPC platform. Before this role, Anya was a founder and General Partner of Healthy Ventures, an early-stage venture capital firm. She has co-founded or served on the boards of over 30 companies. Anya holds a B.A. cum laude from Princeton University and an M.B.A. with honors from The Wharton School at the University of Pennsylvania. Her diverse experience in healthcare and life science technology makes her a key player in the investment landscape.



Richard D. Squires

Founder of Lennox Capital Partners, LP

Richard D. Squires is the Founder of Lennox Capital Partners, LP, a special situations and value-oriented investment partnership. He has been involved in the acquisition, ownership, and management of more than \$2 billion in real estate over the past 30 years. Squires is also a Managing Director and Co-founder of SPI Holdings, LLC, which has extensive national real estate holdings. He has served on the Board of Directors of various public and private companies. His extensive experience in real estate and investment makes him a seasoned professional in the field.



Benjamin Page-Fort

Director of Global Solution Marketing, SimCorp

Benjamin Page-Fort oversees the Go-to-Market strategy at SimCorp, a global provider of investment management solutions. With over 15 years of experience in buy-side technology solutions, Page-Fort has a deep understanding of the challenges and opportunities facing asset managers today. Before joining SimCorp, he served as the Chief Revenue Officer at Solovis, which was later acquired by Nasdaq. Page-Fort specializes in multi-asset class performance and risk management. His roles have required a blend of technical expertise and business acumen, making him a sought-after professional in the industry.



Jake Pasternack

Founder, Chairman & CEO of Praetorian Global

Jake Pasternack is the Founder, Chairman, and CEO of Praetorian Global, a company specializing in intellectual property development and brand building. With over a decade of experience, Pasternack has developed a unique portfolio of branded products designed for long-term value through brand sophistication, product quality, and consistency. Before founding Praetorian Global, Pasternack worked for major film studios where he focused on demand generation through the licensing of intellectual property and the commercialization of luxury products.



Scott Werbel

Managing Director, The Ardent Companies

Scott Werbel is a Partner at The Ardent Companies, a firm with a significant footprint in the real estate sector, boasting \$4.3 billion in capital deployment. The company has a diverse portfolio, including urban and suburban offices, high street retail, shopping centers, and more, spread across the US, UK, Ireland, and the British Virgin Islands. Scott is the linchpin for all international transactions at Ardent. He oversees acquisitions and is responsible for the debt originations of Ardent Financial Fund's debt platform.



Christina Wing

Founder, Wingspan Legacy Partners

Christina Wing founded Wingspan Legacy Partners with the aim of guiding Founders and Families through the complex intersections of family dynamics, business operations, wealth management, and philanthropy. She is also a faculty member at Harvard Business School (HBS), where she focuses her research on Family Enterprises. Christina has created courses and chairs executive education programs at HBS, adding academic rigor to her practical experience. Christina serves as a Senior Advisor at Crestview Partners and sits on multiple advisory boards, making her a well-rounded expert in family business and philanthropy.



Dipika Patel

CEO/CIO Patel Family Office

Dipika Patel, also known as Dee, is a third-generation hotelier with 20+ years in the U.S. real estate industry. She excels in developing, managing, and transacting hotels, spanning select service, full-service, and multi-family properties. Her notable achievements include creating the boutique hotel brand "Hayden" in NYC, with a portfolio of 25+ developed hotels and 50+ transactions. Prior to her current role, she spent 14 years on Wall Street collaborating with top banks and private equity firms. She holds a BSc in Business Finance from Manchester Business School, an MBA from NYU, and is Six Sigma black belt certified from GE's Jack Welch Academy, showcasing her diverse leadership in real estate.



Edward Longhurst-Pierce

Director of Engagement and Partnerships, SWFI

Edward Longhurst-Pierce serves as the Director of Engagement and Partnerships at SWFI. He specializes in public sector and industry engagement across various fields like policy, finance, economics, investment, and regulation. Before joining SWFI in 2022, Edward spent a decade at the UK Policy and Investment Think Tank OMFIF. He was a Board Director from 2014-2019, focusing on long-term, commercially viable products and services. Edward has also been a Trustee and Chairman of the Anglo-Central American Society and the Anglo-Ecuadorian Society.




























Christian K. Winkler

Managing Partner, ASC impact + Evergryn Ventures AG

Christian K. Winkler co-founded ASC impact, a firm specializing in sustainable investments in agriculture and forestry. The firm's first fund, with up to €200 million, focuses on sustainable forestry and agriculture in Sub-Saharan Africa. In addition to ASC impact, Christian also co-founded Evergryn Ventures, an early-stage venture family office that focuses on various tech sectors, providing long-term capital and expertise. Before these ventures, Christian accumulated 12 years of experience in venture capital and banking at leading European firms.

PARTNERS

 KELLOGG COLLEGE				
				
				
				
				



MEDIA PARTNERS



A Heartfelt Thank You From FORT Global North America

Dear Distinguished Attendees,

In the reflection of our recent monumental gathering at The Star, One Cowboys Way, words fall short, but gratitude stands tall.

I had the privilege of beholding a unique convergence - global leaders from vast arenas, be it sovereign wealth funds, Private Capital Titans from Family Offices or impactful policymakers.

Over the course of two transformative days at our bespoke FORT Global North America event, we were honored to host esteemed attendees who represented a remarkable collective strength of \$11 Trillion USD AUM. Within this span, more than 400 guests connected, 40 thought-leaders enlightened us with their insights, 4 panels provoked thought and contemplation, 2 keynote speeches painted vivid vistas of our industry's future, and 6 GOOD Fellows and 13 ICON Awards were announced, celebrating the visionaries among us. These interactions not only fostered a deeper understanding and collaboration among attendees but also set the tone for future endeavors in the wealth management domain.

But beyond these numbers, it was the spirit of collaboration, the evenings filled with enriching conversations, and the mutual respect that reverberated throughout our venue that truly made a mark.

For every private dinner discussion, every networking session, and each recipient of the GOOD Fellows and the ICON Awards - my heartfelt thanks and I am compelled to express my personal gratitude to each one of you.

Together, we've set a benchmark at FORT Global North America. I am supremely confident that with our collective ambition, passion, and dedication, the road ahead holds promises beyond our imaginations.

We have several upcoming gatherings that might align better with your schedule. For more information, please visit fort.global or get in touch directly with emma@fort.global for more information or to set up a call to discuss member activities.

I look forward to leveraging the momentum we've created together and building upon the connections and collaborations initiated at The Star.

Thank you for making this event a benchmark in our industry.

With sincere appreciation,

LAKSHMI NARAYANAN.

**CHAIRMAN,
Sovereign Wealth Fund Institute
FORT Global 2023**



THANK YOU