



SWFI FORT
FAMILY OFFICE ROUND TABLE

THE CONVERGENCE OF CAPITAL

ABU DHABI | SHARJAH | DUBAI
UNITED ARAB EMIRATES

21-22-23
JANUARY
2025



HOSTED BY



SWFI
SOVEREIGN WEALTH
FUND INSTITUTE

"An excellent opportunity to engage with asset owners and investment decisionmakers"

Lord Johnson, UK Minister for Investment

THE WORLD'S LEADING
FAMILY OFFICE
ROUND TABLE



SWFI FORT

PRESENTED BY





“A great opportunity for large investors to find ways to join forces”

Mohammad bin Abdulaziz Alajlan
Deputy Chairman, Ajlan & Bros Holding



“An excellent opportunity to engage with asset owners and investment decisionmakers”

Lord Johnson,
UK Minister for Investment



“The networking opportunity along with the discussion sessions provided a platform for in-depth exploration, understanding, and exchange of ideas.”

H.E. Dr. Nayef Falah Al-Hajraf
Secretary General of The Gulf Cooperation Council (2020-2023)



“The quality of the event, panel sessions and speeches made it a truly leading global forum to discuss key issues with a wide range of large asset owners.”

Ruston Smith
Chairman,
Tesco Pension Fund



“Reaffirms our collective commitment as custodians of global prosperity”

Matthew Hurn OBE
Chief Financial Officer,
Disruptive Investments, Mubadala



“A well-coordinated and insightful conference”

Omar Al Mulla
Chief Executive, Osool Investments,
Sharjah Asset Management Holding

OUR MISSION:

RELATIONSHIP CAPITAL

We help you build your most valuable asset by creating tangible opportunities to network, influence and navigate investment environments.

HOW WE DO THIS:

PEOPLE, PLACE, PLATFORM, PURPOSE

We unite decision-makers from across our global network to create carefully curated environments designed to foster relationships that create lasting value and engender change.

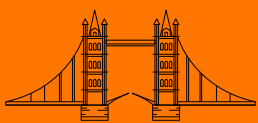


THE CONVERGENCE OF CAPITAL

In an increasingly interconnected world, the role of family offices has evolved beyond wealth preservation to become powerful drivers of global economic and social change. At the heart of this evolution lies the theme of "The Convergence of Capital," which signifies a pivotal moment in the world of wealth management. This theme underscores the unification of family offices from across the globe, embarking on a transformative journey that seeks not only to protect and grow wealth but also to shape the future of global prosperity.

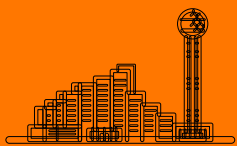
"GLOBAL WEALTH IN ACTION",

the theme of the 2023 Global Wealth Conference in London, ignited the call for proactive participation, urging us to harness our collective wealth as a force for global betterment.



"PRESERVING LEGACY AND PROMOTING PROSPERITY",

the theme of the 2023 FORT North America in Dallas, delved into the profound role family offices play in nurturing and safeguarding wealth across generations while advancing societal well-being.



"ABUNDANCE FOR THE FUTURE",

the theme of the 2024 FORT in Dubai, United Arab Emirates, now takes center stage. This theme is a testament to the resolve and vision of families and their offices in driving positive change, not only for the world's economies but for the planet and humanity itself.



SUSTAINABILITY, ALLOCATION, AND INNOVATION

the theme of GWC 2024 integrated ESG principles, strategic allocation, and innovative strategies in wealth management for lasting impact and growth. SAI drove positive impact, fostered responsible stewardship of wealth, and propelled the financial industry toward a more sustainable and innovative future.



The Convergence of Capital represents a gathering of diverse minds, resources, and visions, all united by a shared commitment to creating a better future. This journey is about more than financial success; it's about leveraging collective capital to foster innovation, drive sustainable growth, and ensure a lasting impact on the world's economies and societies. As family offices and global leaders come together under this theme, they symbolize a new era of collaboration, where wealth is not merely accumulated but actively used as a tool for positive global transformation.

This convergence is a testament to the vision and resolve of the families behind the family offices, who recognize that their influence extends far beyond financial markets. They understand that the true value of wealth lies in its potential to create meaningful change, and they are committed to using their resources to address some of the most pressing challenges of our time. Whether it's investing in sustainable technologies, supporting social enterprises, or contributing to global philanthropic efforts, these family offices are leading the way in redefining what it means to be stewards of wealth.

At the core of The Convergence of Capital is the idea that wealth, when combined with vision and purpose, can be a powerful force for good. It's about channeling global capital into initiatives that promote long-term sustainability, inclusivity, and prosperity. This theme invites family offices to engage in bold, innovative strategies that not only enhance financial returns but also contribute to the well-being of the planet and its people. By aligning their investment strategies with their values, these families are helping to create a future where wealth serves as a catalyst for widespread positive change.

In this spirit of collaboration and innovation, The Convergence of Capital will serve as a platform for family offices and global leaders to exchange ideas, forge partnerships, and drive initiatives that have the power to transform industries, communities, and nations. By coming together, they are not just safeguarding their legacies; they are creating a future where wealth is a tool for building a better world for generations to come.

JOIN US AS WE EMBRACE THIS VISION, WHERE THE CONVERGENCE OF CAPITAL SPARKS A NEW ERA OF GLOBAL PROSPERITY AND IMPACT.

AN INVITE-ONLY EVENT

3 DAY POWER
PACKED EVENT

1 COMMON
THEME

200 SELECTIVE INVITED
GUESTS

7 ILLUMINATING PANEL
DISCUSSIONS

1 PIONEERING START-UP PITCHES,
SHOWCASING THE LATEST IN
INNOVATION

10 NETWORKING
SESSIONS

3 GOOD FELLOWS
AWARD RECOGNITIONS

2 TRILLION USD
AUM HALL



WHO WILL BE ATTENDING?

KEY DECISION MAKERS FROM

SINGLE FAMILY OFFICES
VENTURE CAPITAL
PRIVATE EQUITY
ENDOWMENTS AND FOUNDATIONS
SOVEREIGN WEALTH FUNDS
PUBLIC PENSIONS
ULTRA-HIGH-NET-WORTH INDIVIDUALS
CORPORATE VENTURE ARMS
ANGEL INVESTORS
MULTI FAMILY OFFICES
ACCELERATORS AND INCUBATORS
HEDGE FUNDS
CORPORATE INVESTORS
ASSET MANAGERS
ACADEMICS
GOVERNMENT ENTITIES
DEVELOPMENT BANKS
REAL ESTATE TRUSTS
BANKS
ENTREPRENEURS

**HOST CITIES FOR
SWFI FORT UAE - 2025**



BESPOKE FORMAT

MAXIMIZES INVESTMENT INTERACTIONS

SWFI events offer a blend of heavy-hitting panel discussions and plenary sessions with regular networking opportunities and social interactions to maximize time spent exchanging views and sharing best practices while creating new linkages and deepening existing relationships.

JOIN US FOR THE EVENT WHERE EVERY MOMENT IS AN OPPORTUNITY TO CONNECT AND EVERY SESSION PROMISES A WEALTH OF INSIGHTS.



These are the actual event photographs from SWFI FORT Middle East 2024 hosted in Dubai at the Museum of The Future. For more information, visit [fort.global](https://www.fort.global).

Abu Dhabi's award-winning hub for innovation **Manarat Al Saadiyat**, or 'place of enlightenment' in Arabic, celebrates Emirati heritage while following the SWFI ethos of fostering global dialogue.

DAY ONE
JANUARY 21ST



VENUE:

ABU DHABI
MANARAT AL SAADIYAT

Scan QR code for the
Abu Dhabi venue



PROGRAM AGENDA

DAY ONE: ABU DHABI, MANARAT AL SAADIYAT, 21 JANUARY 2025 THE CONVERGENCE OF CAPITAL: SOVEREIGN FUNDS AND FAMILY OFFICES UNITE

The SWFI ethos of 'People, Place, Platform, Purpose' resonates deeply with the values upheld in a traditional Majlis - a safe space where participants gather to openly engage in a dialogue, forge relationships and exchange experiences. Together, they embody a commitment to navigating common challenges and preserving wealth for future generations while fostering a strong sense of community and shared purpose. These special sessions address two of the most pressing issues of the day – how digitalization is reshaping the investment – and policy – sphere; and the impact of multiple crises on decision-making.

1330 – 1440 Registration and Refreshments

1440 – 1445 Welcome Remarks

1445 – 1500 Opening Address: Real Estate Investments and New Age Wealth
Lakshmi Narayanan, Chairman, SWFI; Managing Partner, Patel Family Office

1500 – 1600 Session One

DIGITAL ASSETS: NEW OPPORTUNITIES TO UNLOCK LIQUIDITY, MONETISE ASSETS AND FUEL ECONOMIC GROWTH

This session explores how sovereign wealth funds, family offices, and other asset owners are driving innovation by investing in blockchain companies, digital asset platforms, and emerging payment systems. The panel will assess the impact of macroeconomic events on the broader digital asset landscape and evaluate the regulatory outlook in the Middle East, considering the UAE example of the AED Stablecoin. Gain insights into the evolving role of digital asset funds in portfolio diversification and their potential to reshape investment strategies amid a rapidly shifting regulatory and economic environment.

New US Administration: Will new policies promote or restrict innovation?

Regulatory Environment: How is the digital asset landscape evolving?

Portfolio Diversification: How are digital assets redefining investment strategies?

- **Miguel Kudry**, Chief Executive Officer and Co-Founder, L1
- **Marcel Kasumovich**, Deputy Chief Investment Officer, Coinbase Asset Management
- **Simon O'Brien**, Executive Director - Markets, Abu Dhabi Global Market
- **Dr Sameer Al Ansari**, Chief Executive Officer, RAK Digital Assets Oasis
- **Dr Bhaskar Dasgupta**, Chairman of the Board & Non-Executive Director, Apex UAE, Bahrain, Israel & India
- **Gaurang Desai**, Managing Director, Equiti Group; Chairman, D2A2
- **Dr Suraj Reddy**, Co-founder, Voyage Capital

Moderator: **Kokila Alagh**, Founder, KARM; Member, Fintech Working Group, Arab Monetary Fund

PROGRAM AGENDA

DAY ONE: ABU DHABI, MANARAT AL SAADIYAT, 21 JANUARY 2025 THE CONVERGENCE OF CAPITAL: SOVEREIGN FUNDS AND FAMILY OFFICES UNITE

1600 – 1630 Registration and Refreshments

1630 – 1635 Welcome Remarks

1635 – 1650 Transparency and Objectivity, a New Era in the Global Sovereign Rating Landscape
Revati Kasture, Executive Director, CareEdge Ratings; Chief Executive, CareEdge Global

1650 – 1800 Session Two

GLOBAL MACRO: THE IMPACT OF GEOPOLITICS AND ECONOMIC HEADWINDS

Asset owners are facing an increase in interrelated challenges brought about by political and economic instability, conflict and climate change. 2024 saw elections affect nearly half the global population. Yet long-term investment approaches afford greater flexibility, allowing planning for the long term, even in times of uncertainty. This panel explores how different types of asset owners approach these issues, and to what extent strategies adopted in one jurisdiction or among one type of investor can apply to another.

Global Economic Trends: How are asset owners responding to macro events and geopolitical shifts?

Liquidity and Stability: How are investors balancing long-term investment goals with short-term obligations?

Risk Management: As portfolios diversify, what are the most effective risk management strategies?

- **Khurram Sabir**, Chief Risk Officer, General Pension and Social Security Authority
- **Dr Aniseh Bassiri Tabrizi**, Senior Analyst, Control Risks; Associate Fellow, Chatham House
- **Rt Hon Sir Brandon Lewis CBE**, former Lord Chancellor, Secretary of State & British MP; Member of the Board of Directors, Veon
- **Dr Ahmed Mansour**, Group Chief Executive, Private Department of H.E. Sheikh Mohammed Bin Khalid Al Nahyan
- **Qaisar Zaman**, Chief Investment Officer, Rakiza Infrastructure Fund
- **David Marsh CBE**, Chairman, OMFIF; Author, *The Euro*

Moderator: **Ilias Georgopoulos**, Global Head of Private and Institutional Asset Owners, IQ-EQ

1800 - 1930 Networking Reception

Among the UAE's oldest economic institutions, **The Sharjah Chamber** plays a critical role in fostering economic diversification, mirroring the emphasis SWFI places on cross-border linkages.

DAY TWO
JANUARY 22ND



VENUE:

SHARJAH
SHARJAH CHAMBER OF
COMMERCE AND INDUSTRY

Scan the QR code for the
Sharjah venue



PROGRAM AGENDA

DAY TWO: SHARJAH, SHARJAH CHAMBER OF COMMERCE & INDUSTRY 22 JANUARY 2025

THE CONVERGENCE OF CHANGE: SHARJAH'S ECONOMIC EVOLUTION: OPPORTUNITIES FOR GLOBAL INVESTORS

0900 – 1000 Registration and Refreshments

1000 – 1010 Welcome Remarks
Omar Al Mulla, Chief Executive, Osool Investments, Sharjah Asset Management Holding

1010 – 1030 Opening Address: New Age Wealth and Sustainable Investment
Lakshmi Narayanan, Chairman, SWFI; Managing Partner, Patel Family Office

1030 – 1130 Moderated Roundtable Discussion

TRADITION MEETS MODERNITY: SHARJAH AS A REGIONAL LEADER IN ECONOMIC DIVERSIFICATION AND SUSTAINABILITY

The Emirate of Sharjah is rapidly emerging as a key investment destination, driven by its diversified economy spanning manufacturing, healthcare and technology. Its strategic location between Dubai and Abu Dhabi offers access to global markets, complemented by robust infrastructure development in industrial zones and residential areas. With favorable regulatory incentives, including tax exemptions and free zones, Sharjah is business-friendly. The Emirate's emphasis on sustainability and cultural tourism further enhances its appeal, creating diverse opportunities for investors across various sectors.

Healthcare: How is Sharjah driving innovation and investment in advanced healthcare services?

Technology: What opportunities exist for technology investors in Sharjah's growing digital ecosystem?

Sustainable Finance: How is Sharjah attracting investments in renewable energy and related initiatives?

- **Marwan Alichla**, Director, Investment Promotion & Support, Sharjah FDI Office - Invest in Sharjah
- **Dr Maliha Hashmi**, Member, Advisory Board for Arab Health
- **Salim Al Shaami**, Director of Government Relations and Digital Transformation, Sharjah Research, Technology and Innovation Park
- **Dr Mohamed Al Hemaury**, Project Manager, Innovation & Entrepreneurship Hub; Head, Technology Transfer Office, University of Sharjah
- **Denys Grabchak**, Founder & Chief Executive Officer, Performetry; AI Advisor to the UAE Government

Moderator: **Edward Longhurst-Pierce**, Chief Executive, SWFI Global

PROGRAM AGENDA

DAY TWO: SHARJAH, SHARJAH CHAMBER OF COMMERCE & INDUSTRY 22 JANUARY 2025

INAUGURAL CHARITY LUNCHEON IN THE MIDDLE EAST

Held in collaboration with Sharjah Asset Management Holding and The Big Heart Foundation, the inaugural Middle East Charity Luncheon will be held on January 22 in the Emirate of Sharjah. This event will unite like-minded individuals to raise funds for a foundation working in the education sector. Guests who would like to make a charitable gift to the foundation are warmly invited to an opportunity for discussion and networking, serving as a catalyst for meaningful, long-term change both in the region and further afield.

1130 – 1230 Registration and Networking Reception

1230 – 1240 Welcome Remarks
Omar Al Mulla, Chief Executive, Osool Investments, Sharjah Asset Management Holding

1240 – 1250 Opening Address: Empowering Future Generations Through Improved Access to Education
H.E. Mariam Al Hammadi, Director General, The Big Heart Foundation

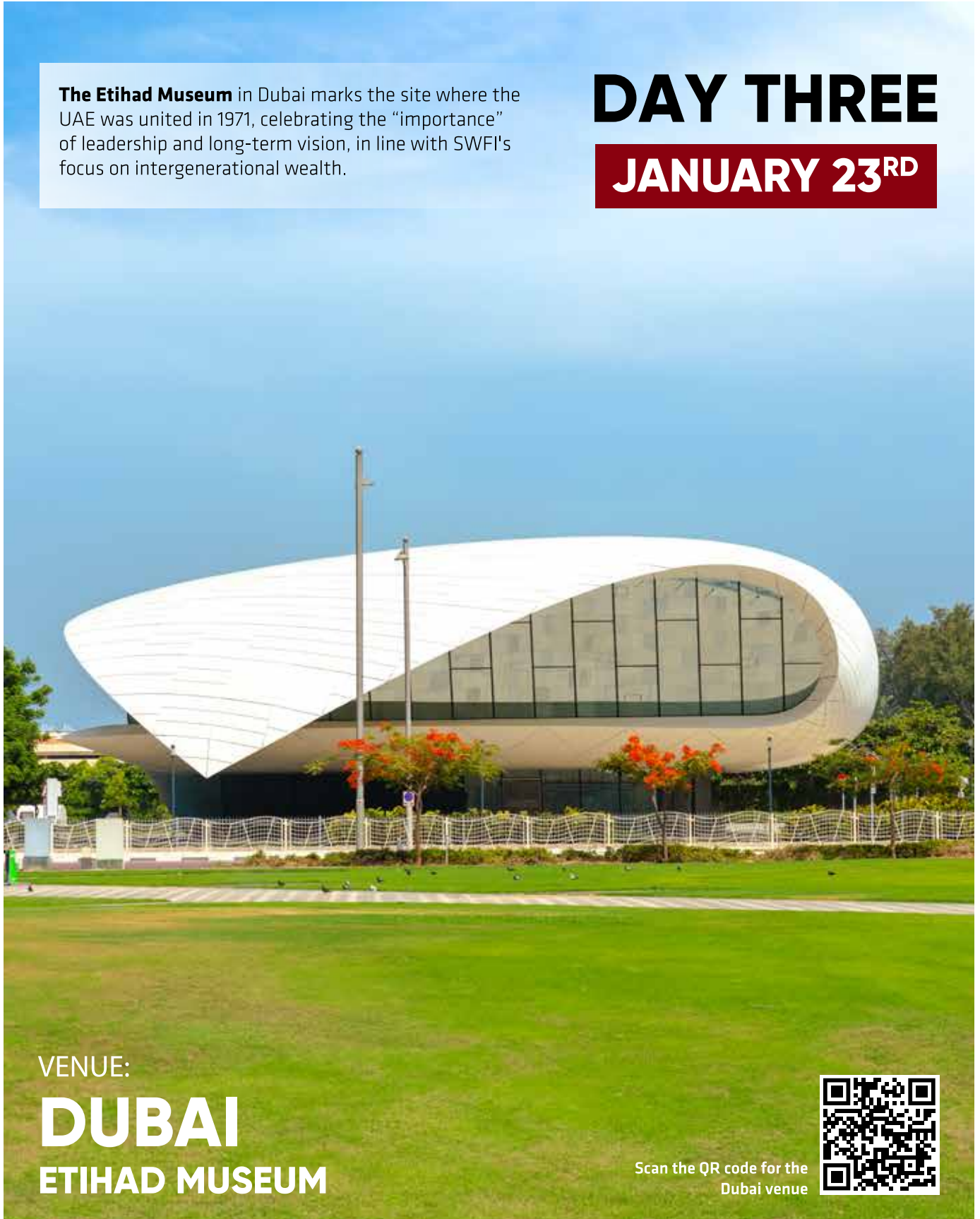
1340 – 1400 GOOD Fellows Award Felicitations and GOOD Talk
Rt Hon Sir Brandon Lewis CBE, former Lord Chancellor, Secretary of State & British MP;
Member of the Board of Directors, Veon

1425 – 1430 Vote of Thanks to Close

The Etihad Museum in Dubai marks the site where the UAE was united in 1971, celebrating the “importance” of leadership and long-term vision, in line with SWFI's focus on intergenerational wealth.

DAY THREE

JANUARY 23RD



VENUE:

DUBAI

ETIHAD MUSEUM

Scan the QR code for the
Dubai venue



PROGRAM AGENDA

DAY THREE: DUBAI, ETIHAD MUSEUM, 23 JANUARY 2025 THE CONVERGENCE OF CULTURES: DUBAI AS A GLOBAL FAMILY OFFICE HUB

0830 – 0930 Registration and Networking

Morning Session One

0930 – 0940 Welcome, Housekeeping and Setting the Tone for Day Three

0940 – 0950 Opening Remarks

Lakshmi Narayanan, Chairman, SWFI; Managing Partner, Patel Family Office

0950 – 1050 Panel Discussion One

CO-INVESTMENT LANDSCAPE: RESOURCE POOLING AND ACCESS TO UNIQUE OPPORTUNITIES

As family office investment practices become more sophisticated, partnerships between different types of investors have become an effective and cost-efficient strategy, offering significant benefits in low-interest rate environments. By combining expertise in industry, regional markets and other niche areas, both parties can achieve enhanced returns. This session explores how these collaborations are reshaping the investment landscape, the advantages they provide, and their future potential. With an emphasis on portfolio diversification, asset classes covered in this session include:

Private Equity and Venture Capital: Is there more to life than tech and renewables?

Alternatives to Fixed Income: How is direct lending and structured credit evolving?

Cross-border Real Estate: Where are the high grow destinations for data centers, logistics and REITs?

- **MaameYaa Kwafo-Akoto**, Partner, A&O Sherman
- **H.E. Sheikh Mohammed Al Harthy**, Chief Executive, Oman Food Investment Holding - Nitaj
- **Maher Al Kaabi**, Independent Board Member & Advisor to Group Chairman, Al Serkal Group
- **Mohamed Seghir**, Chief Executive Officer, HAYAH Insurance Company
- **Mehmet Akgunay**, Senior Investment Officer, International Finance Corporation
- **Hasnae Taleb**, Managing Partner, Mintiply Capital

Moderator: **Anjani Trivedi**, Global Business Correspondent, *The Economist*

1050 – 1110 GOOD Fellows Award Felicitation and GOOD Talk

H.E. Sheikh Fahim Bin Sultan Bin Khalid Al Qasimi,
Chairman, Department of Government Relations; Member of the Executive Council of Sharjah

1110 – 1140 Networking Break

PROGRAM AGENDA

DAY THREE: DUBAI, ETIHAD MUSEUM, 23 JANUARY 2025 THE CONVERGENCE OF CULTURES: DUBAI AS A GLOBAL FAMILY OFFICE HUB

Morning Session Two

1150 – 1200 Opening Remarks

Rt Hon Sir Brandon Lewis CBE, former Lord Chancellor, Secretary of State & British MP;
Member of the Board of Directors, Veon

1200 – 1300 Panel Discussion Two

FAMILY OFFICE 2030: ALTERNATIVES, TECHNOLOGY, AND THE ROLE OF AI

Family offices are increasingly adopting new technologies to boost efficiency, investment analysis and data security. They are leveraging advanced tools for portfolio management and risk assessment, guiding informed decisions in rapidly evolving markets. This session outlines a roadmap for adapting to emerging technologies and explores emerging high-yield asset classes that are gaining popularity among Middle Eastern investors seeking diversification and wealth preservation.

AI and Innovation: How are private equity firms leveraging new technologies to enhance returns?

AI and investment Strategies: How is AI influencing alternative investment strategies?

Real Estate: Is the tokenization of real world assets gathering pace?

- **Ali Abouda**, Group Chief Financial Officer, Gulf Navigation Holding
- **Kishlaya Misra**, Senior Investment Officer, Private Equity, Asian Infrastructure Investment Bank
- **Mohammad Alothman**, Group Chief Executive Officer, Fujairah Holding (2018-24); Founder, AI Tech Solutions
- **Xavier Marconnet**, Head of Core AI Equities, Unigestion
- **Shabnam Mohammad**, Board Member, Dubai Islamic Bank Pakistan; Nominee Director, International Finance Corporation

Moderator: **Lin Noueihed**, Managing Editor, Monify

1300 – 1430 Networking Lunch

PROGRAM AGENDA

DAY THREE: DUBAI, ETIHAD MUSEUM, 23 JANUARY 2025 THE CONVERGENCE OF CULTURES: DUBAI AS A GLOBAL FAMILY OFFICE HUB

Afternoon Session One

1430 – 1530 Panel Discussion Three

UNITED IN EMPATHY: ALIGNING FAMILY VALUES WITH STRATEGIC PHILANTHROPY

Philanthropy and family-run foundations are increasingly aligning family values with social influence to drive sustainable futures. These foundations are pioneering sustainable investment products, particularly in education and healthcare, blending traditional values with modern impact investing. They actively contribute to global challenges, shaping long-term visions for societal improvement. Through these initiatives, family-run organizations are establishing themselves as leaders in strategic philanthropy. This roundtable session looks at emerging trends, best practices and the regulatory environment from the UAE to the wider GCC region – and beyond.

Second generation philanthropy: Are strategic philanthropic models like impact investing, micro lending and donor-advised funds becoming mainstream?

Education: How is tech-driven innovation in education segments driving investments across the region?

Healthcare and Biotechnology: What is the outlook for healthcare and biotech as populations age and tech advances?

- **Safia Tmiri**, Executive Director, Alfanar Venture Philanthropy
- **Naila Farouky**, Chief Executive Officer, Arab Foundations Forum
- **Claudia Pinto**, Head of Philanthropy & Sustainability Advisor, Private Office of HH Sheikh Marwan bin Mohammed bin Rashid Al Maktoum
- **Prof. Winnie Peng**, Director, Roger King Center for Asian Family Business and Family Office, Hong Kong University of Science and Technology
- **Dr Marco Bodellini**, Senior Research Scientist, University of Luxembourg; ADA Chair in Financial Law - Inclusive Finance

Moderator: **Dr Celeste Cecilia Moles Lo Turco**, Sovereign Wealth Fund and Sustainability Expert

1530 – 1550 GOOD Fellows Award Felicitation and GOOD Talk
Dr Maliha Hashmi, Member, Advisory Board for Arab Health

1550 – 1620 Networking Break

PROGRAM AGENDA

DAY THREE: DUBAI, ETIHAD MUSEUM, 23 JANUARY 2025 THE CONVERGENCE OF CULTURES: DUBAI AS A GLOBAL FAMILY OFFICE HUB

Afternoon Session Two

1620 – 1630 Opening Address: How is New Age Wealth Defining Prediction Markets?
Lakshmi Narayanan, Chairman, SWFI; Managing Partner, Patel Family Office

1630 – 1720 Panel Discussion Four

GROWING PAINS: GOVERNANCE, SUCCESSION PLANNING AND NEXT GEN ENGAGEMENT

As the number of family offices globally continues to grow, operating models must evolve to accommodate new challenges. This session explores the critical role of family governance and outlines operational priorities to ensure the longevity and prosperity of family-owned businesses, with a particular focus on investment decision-making and diversification. The discussion will explore the unique challenges faced by Gulf family businesses and to what extent structures adopted by overseas family offices suit the region's family business dynamic.

Governance Challenges: How are family office management structures becoming more sophisticated?

Succession Planning: How do principals maintain stability, ensure smooth transitions and avoid internal conflicts?

Next Generation Engagement: Which tried and tested strategies help prepare next generations for future responsibilities?

- **Dr Adil Alzarooni**, Chief Executive, Al Zarooni Emirates Investments
- **Khalid Rashid Al Zayani**, Honorary Chairman, Al Zayani Investments
- **Ilias Georgopoulos**, Global Head of Private and Institutional Asset Owners, IQ-EQ
- **Gilbert Nyatanyi**, Chief Executive Officer, Agaciro Development Fund (2020-23)

Moderator: **Teodora Cosic**, Founding Partner, Expert Search; Advisory Board Member, Serbian-American Friendship Congress

1720 – 1730 Closing Remarks & Vote of Thanks

1730 – 1900 Networking Reception

SWFI FORT Global event is brought to you by the Sovereign Wealth Fund Institute (SWFI).

The event is hosted by the same prominent team that led SWFI FORT Middle East at the futuristic Museum of The Future in February 2024.



SWFI: MOBILIZING INSTITUTIONAL AND PRIVATE CAPITAL SINCE 2008

SWFI stands at the vanguard of global finance, serving as the nexus between sovereign wealth funds, pensions, endowments, superannuation funds, and family offices. With its wide-reaching influence, SWFI orchestrates a symphony of ideas, innovation, and investment, driving the agenda for sustainable and inclusive global wealth.

Our community, comprising over 70,000 professionals and representing more than 1,200 public institutional investors from over 60 countries, is a testament to our expansive reach and our pivotal role in shaping global financial trajectories. This network, underpinned by a shared commitment to financial prosperity, enables a rich exchange of ideas and innovation, driving sustainable and inclusive global wealth.

SWFI PAST EVENTS IN SYNOPSIS

80+
Private Global Events

60+
cities

1,000+
Institution Participation

500+
family offices

12,000+
Delegates

20+
Countries

600+
Prominent Speakers

300+
Networking Dinners

750+
Topics Discussed

300+
Endowments

50+
Regulatory
Organizations

70+
Sovereign Wealth
Funds

AND MORE

GOOD FELLOWS AWARDS

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.

An integral part of the felicitation is the GOOD Talk. This is a 15-minute interactive dialog between each award recipient and the SWFI Chairman, Lakshmi Narayanan. Here the recipients share their vision and experiences, offering insights into their journey and the motivations behind their impactful work. The idea is to not only celebrate their achievements but also serve to inspire the audience, reinforcing the importance of using wealth and influence for the greater good.



These are the actual event photographs from the GOOD Fellows Awards Ceremony hosted at SWFI FORT Middle East 2024 hosted in Dubai at the Museum of The Future. For more information, visit [fort.global](https://www.fort.global).

HIGH IMPACT GATHERINGS IN 2024

GLOBAL WEALTH CONFERENCE | LONDON MAY 2024



These are the actual event photographs from GWC 2024 hosted in London at the iconic Parliament of UK and Guildhall, Great Hall. For more information, visit [gwc.events](https://www.gwc.events).

SWFI FORT MIDDLE EAST | DUBAI FEBRUARY 2024



These are the actual event photographs from SWFI FORT Middle East 2024 hosted in Dubai at Museum of The Future. For more information, visit [fort.global](https://www.fort.global).

GLOBAL WEALTH CONFERENCE | LONDON MAY-JUNE 2023



These are the actual event photographs from GWC 2023 hosted in London at the iconic Parliament of UK and Guildhall, Great Hall. For more information, visit [gwc.events](https://www.gwc.events).

SWFI FORT NORTH AMERICA | DALLAS OCTOBER 2023



These are the actual event photographs from SWFI FORT North America 2023 hosted in Dallas at The Star. For more information, visit [fort.global](https://www.fort.global).

NEW AGE WEALTH

BUILDING WEALTH IN THE DIGITAL AGE

12 FEBRUARY 2025 | DALLAS, TEXAS

Hosted by



IN PARTNERSHIP WITH



SUPPORTED BY



EXPLORE, ENGAGE, EDUCATE AND EMPOWER
YOURSELF WITH **NEW AGE WEALTH.**
BUILD RELATIONSHIP CAPITAL, YOUR PATHWAY
TO FINANCIAL CAPITAL.

EVENT OVERVIEW



February 12, 2025



11:30 am to 10:00 pm



CONFERENCE

Old Parkland,
Dallas, Texas

GALA DINNER

The Star, One Cowboys Way,
Frisco, Dallas, Texas

A MUST ATTEND EVENT TO BUILD TANGIBLE OPPORTUNITIES TO NETWORK,
INFLUENCE AND NAVIGATE INVESTMENT ENVIRONMENTS.



TO KNOW MORE, VISIT [SWFI.COM/NEWAGEWEALTH](https://swfi.com/newagewealth)
ATTENDANCE, BY INVITATION ONLY

REQUEST INVITATION

JOIN TELEGRAM & WHATSAPP CHANNEL



JOIN TELEGRAM



JOIN WHATSAPP

SWFI EVENTS

GLOBAL EVENTS CALENDAR

2025 PROGRAMME




SWFI FORT MIDDLE EAST
JANUARY 21-23, 2025
ABU DHABI | SHARJAH | DUBAI
UNITED ARAB EMIRATES



NEW AGE WEALTH
FEBRUARY 12, 2025
DALLAS, TEXAS
USA



GLOBAL WEALTH CONFERENCE
JUNE 3, 4, & 5, 2025
LONDON
UK



SWFI FORT NORTH AMERICA
OCTOBER 2025
DALLAS, TX
USA

*Note: The dates and the location are subject to change. See www.fort.global for up to date information.

SHAPING TOMORROW WITH TODAY'S VISIONARIES



Robert F Kennedy Jr.
at SWFI FORT North America



**Vivek Ramaswamy with SWFI Chairman
Lakshmi Narayanan at Summit 2023**



AR Rahman
at SWFI FORT Middle East 2024



Swami Brahmvihari Das
at SWFI FORT Middle East 2024



SWFI FORT
FAMILY OFFICE ROUND TABLE



SWFI
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Chris@swfinstitute.org

