

# 11th Annual Stanford Family Office Investor Forum

## EVENT AGENDA

📅 November 11 - 12, 2025

📍 United States-Stanford

🌐 <https://familyofficeuniversitynetwork.zohobackstage.com/11thAnnualStanfordFamilyOfficeInvestorForumCopy1>

SESSION TYPES:

- 📅 Registration
- 🗨️ Welcome Note
- 👤 Keynote
- 🖥️ Presentation
- 🕒 Break
- 🍷 Reception

Day - 1 : Tuesday, November 11, 2025

| TIME               | SESSION DETAILS                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10:30 AM<br>1h 15m | <div>📅 Registration</div> <div>📍 Paul Brest Hall</div>                                                                                                                                                                                                                                                                                                                                                   |
| 11:45 AM<br>15m    | <div>🗨️ Welcoming Remarks</div> <div>📍 Paul Brest Hall</div> <div><div> Howard Cooper</div><div> Steve Oyer</div><div> Rajiv Sharma</div></div> |
| 12:00 PM<br>30m    | <div>👤 Keynote Lunch. Session A. Submergence Intensity: A Contextualized Risk Metric for Long-Term Investing.</div> <div>📍 Paul Brest Hall</div> <div><div> Ashby Monk</div></div>                                                                                                                                    |

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|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 12:30 PM<br>30m | <div> Keynote Lunch. Session B. Universal Cognitive Investment Management Research.</div> <div> Paul Brest Hall</div> <div> Ashby Monk</div>                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 01:00 PM<br>45m | <div> Session 1. Trends in the Artificial Intelligence Investment Landscape</div> <div> Paul Brest Hall</div> <div> Guy Yamen</div>                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 01:45 PM<br>1h  | <div> Session 2. Climate Finance and Policy</div> <div> Paul Brest Hall</div> <div> Reuven Carlyle</div> <div> Jane Woodward</div> <div> Delia Cristea</div> <div> DL Daniel Levine</div> <div> Henry Stern</div> |
| 02:45 PM<br>30m | <div> Networking Break</div> <div> Paul Brest Hall</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 03:15 PM<br>45m | <div> Session 3. Real Estate - The Amazonification of Supply Chain Real Property. Fireside Chat.</div> <div> Paul Brest Hall</div> <div> Jason Isaacson</div> <div> Nelson Koen</div>                                                                                                                                                                                                                                                                               |

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|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 04:00 PM<br>1h     | <div>Session 4. Global Family Office Round Table. Best Practices / Trends.</div> <div>Paul Brest Hall</div> <div><div>Chris Nason</div><div>Danielle Valkner</div><div>Scott Saslow</div></div> |
| 05:00 PM<br>1h     | <div>Stanford Student-led Start-up Presentations</div> <div>Paul Brest Hall</div>                                                                                                                                                                                                                                                                                                                                                                  |
| 06:00 PM<br>1h     | <div>Networking Reception</div> <div>Paul Brest Hall</div>                                                                                                                                                                                                                                                                                                                                                                                         |
| 07:00 PM<br>1h 45m | <div>Keynote Dinner. Trade and Tariffs. Globalization vs Nationalism.</div> <div>Paul Brest Hall</div> <div><div>Gita Wirjawan</div><div>Ashby Monk</div></div>                                                                                                              |

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### SESSION TYPES:

🍽️ Breakfast   🎤 Welcome Note   📺 Presentation   ⌚ Break   🎤 Keynote  
👥 Reception

## Day - 2 : Wednesday, November 12, 2025

| TIME            | SESSION DETAILS                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 08:00 AM<br>45m |  Networking Breakfast<br>📍 Paul Brest Hall                                                                                                                                                                                                                                                                                                             |
| 08:45 AM<br>15m |  Welcoming Remarks<br>📍 Paul Brest Hall<br> Howard Cooper  Steve Oyer  Rajiv Sharma           |
| 09:00 AM<br>45m |  Session 5. Community Focused Investing Through Opportunity Zones - Developing Renewable Power At Scale. Fireside Chat.<br>📍 Paul Brest Hall<br> Jagpaul Singh  Rebecca Lester |
| 09:45 AM<br>45m |  Session 6. Energy transition, Natural Gas, Crypto Mining<br>📍 Paul Brest Hall<br> Peter Nakada                                                                                                                                                                   |

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Day - 2 : Wednesday, November 12, 2025

| TIME               | SESSION DETAILS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10:30 AM<br>30m    | <div></div> <div>Networking Break</div> <div> Paul Brest Hall</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 11:00 AM<br>1h 15m | <div></div> <div>Session 7. Family Office Philanthropic Initiatives.</div> <div> Paul Brest Hall</div> <div><div> Amy Taylor</div><div> Lili Thomas Buffett</div><div> David Huntsman</div><div> Robert K. Jackler</div><div> James Toma</div></div> |
| 12:15 PM<br>1h 30m | <div></div> <div>Keynote Lunch. Community Revitalization.</div> <div> Paul Brest Hall</div> <div><div> Pat Ryan</div></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 01:45 PM<br>1h     | <div></div> <div>Session 8. Direct Investing.</div> <div> Paul Brest Hall</div> <div><div><div>DN</div><div> David Neiman</div></div><div> Amit Bansal</div><div> Tamara Polewik</div></div>                                                                                                                                                                                                                  |
| 02:45 PM<br>45m    | <div></div> <div>Session 9. Market Trends. Public and Private. Fireside Chat.</div> <div> Paul Brest Hall</div> <div><div> Ilya A. Strebulaev</div><div> Joe LaTurner</div><div> JanetLee Santiago</div></div>                                                                                                                                                                                                |

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|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 03:30 PM<br>30m | <div></div> Networking Break<br><div> Paul Brest Hall</div>                                                                                                                              |
| 04:00 PM<br>1h  | <div></div> Session 10. Health Tech Bio Pharma.<br><div> Paul Brest Hall</div> <div> Jeremy Krell</div> |
| 05:00 PM<br>45m | <div></div> Session 11. TBD.<br><div> Paul Brest Hall</div>                                                                                                                              |
| 05:45 PM<br>1h  | <div></div> Networking Cocktail Reception<br><div> Paul Brest Hall</div>                                                                                                              |