

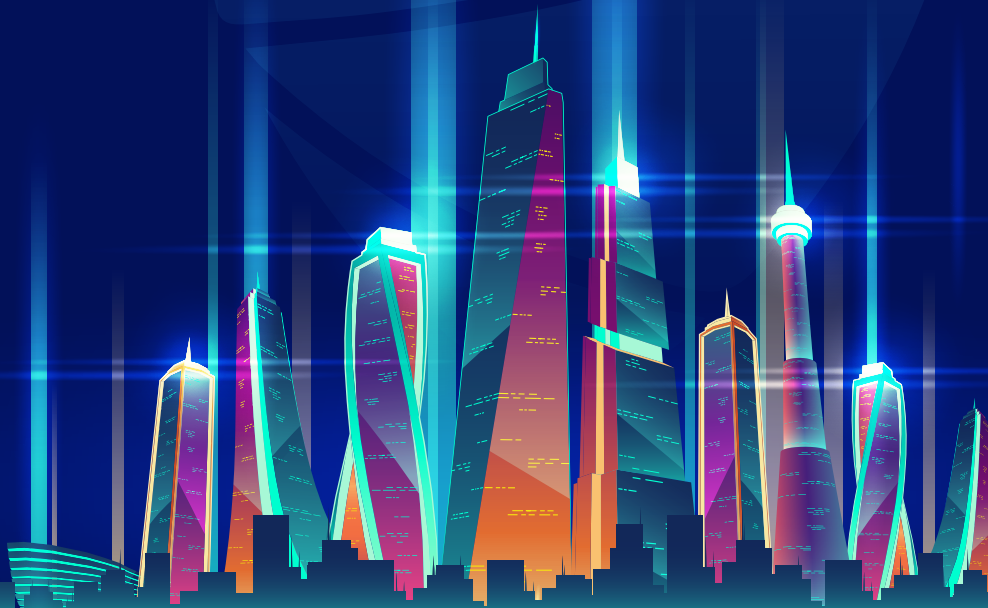
NEW AGE WEALTH

12 FEBRUARY 2025 | DALLAS, TEXAS

Hosted by



In Partnership With



SUPPORTED BY



GET AHEAD OF THE CURVE IN 2025

JOIN EXPERTS TO UNCOVER HOW TOKENIZATION AND DIGITAL ASSETS ARE REVOLUTIONIZING INVESTMENTS.

New Age Wealth is an exclusive series of private gatherings by SWFI (Sovereign Wealth Fund Institute) designed to educate, engage, and empower leaders to navigate the evolving landscape of digital assets and uncover forward-thinking strategies for sustaining and growing wealth. It brings together Family Offices, UHNW Individuals, Asset Allocators, Institutional Investors, and Wealth Advisors with the policymakers and change makers of the industry to drive meaningful advancements in the financial world.

EXPLORE NEW AGE WEALTH AND BUILD RELATIONSHIP CAPITAL: YOUR GATEWAY TO FINANCIAL PROSPERITY

EXPLORE

Discover groundbreaking opportunities in the digital asset landscape. From tokenized real estate to decentralized finance, gain exclusive insights into the innovations shaping "New Age Wealth."



EDUCATE

Learn from industry pioneers and visionaries about emerging trends, market intelligence, and the future of digital assets. Equip yourself with the knowledge to navigate and capitalize on this transformative era.



ENGAGE

Connect with global leaders, institutional investors, and thought innovators. Build meaningful relationships that expand your network and create pathways for strategic collaborations.



EMPOWER

Walk away with actionable insights, tools, and connections to drive your wealth journey forward. Empower yourself to thrive in the modern financial ecosystem and unlock new possibilities.



Date:

February 12th, 2025

Time:

11.30 AM to 10:00 PM

Locations:

CONFERENCE
Old Parkland,
Dallas, Texas

GALA DINNER

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



OUR MISSION: RELATIONSHIP CAPITAL

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



AN INVITE-ONLY
EVENT

10 HOURS OF POWER
PACKED EVENT

01 COMMON
THEME

230 SELECTIVE INVITED
GUESTS

02 ILLUMINATING PANEL
DISCUSSIONS

01 PRIVATE LUNCH

01 GALA DINNER

02 FIRESIDE CHATS

02 DESIGNATED
NETWORKING BREAKS
NUMEROUS OPPORTUNITIES FOR
ORGANIC CONNECTIONS

01 GOOD FELLOWS
AWARD

01 KEYNOTE ADDRESS

AT ONE OF THE MOST EXCLUSIVE VENUES IN DALLAS

WHERE TradFi MEETS DeFi

A Gathering of Visionaries

This exclusive event will host global leaders, innovators, and key stakeholders from traditional finance (TradFi) and decentralized finance (DeFi). Join us to explore the latest trends in tokenization, digital assets, and the future of wealth creation.

Highlights

Engaging Discussions: Gain insights from thought leaders at the forefront of digital transformation.

Big Reveals: Be the first to learn about industry advancements and strategic initiatives.

Networking Opportunities: Connect with investors, institutional leaders, and innovators shaping the financial future.

Speakers

Our Esteemed Speakers Feature:

Pioneers in tokenization and digital assets
Leaders from Global Family Offices, Institutional Funds, and Sovereign Wealth Funds
Renowned Experts in Blockchain, DeFi, and Digital Finance

Who Should Attend

This event is designed for:

Institutional Investors
Venture Capitalists
Private Equity Professionals
New Adopters to the Digital Asset Ecosystem
Capital Allocators
Real Estate Investors
Real Estate Fund Managers
Financial Product Distributors
Wealth Advisors

PROGRAM AGENDA



By Invitation Only - Private Lunch 1

Industry Leaders Luncheon
Location : Dining Room at the Pavilion
Timing : 11.30 AM - 1.00 PM
(Seated Lunch)



By Invitation Only - Private Lunch 2

Patel Family Office Lunch
Location : Board Room at the Old Parkland
Timing : 11.30 AM - 1.00 PM



Main Event

Location : Debate Chambers at the Old Parkland
Timing : 1:30 PM - 5:00 PM

12.30 PM - 1.20 PM - Registration and Networking

By invitation only

(Pavilion) Hall opens by 1.25 PM

MAIN EVENT - FIRST SESSION

1.30 PM - 1.35 PM - Welcome Note by Edward Longhurst-Pierce, CEO, SWFI Private Gatherings

1.35 PM - 1.40 PM - Setting the stage for the main event

Lee Bratcher, President, Texas Blockchain Council

1.40 PM - 2.25 PM - Panel Discussion 1

Topic :

2.25 PM - 2.45 PM - The New Age Wealth

Presented by Lakshmi Narayanan, Managing Member, Patel Family Office; Chairman, SWFI

2.45 PM - 3.00 PM - One-on-One Discussion

Topic and the Speaker : TBD

3.00 PM - 3.30 PM - Coffee and Tea break

MAIN EVENT SECOND SESSION

3.30 PM - Reconvene for the second session

3.30 PM - 3.35 PM - Setting the tone for the Second Session

Edward Longhurst-Pierce, CEO of SWFI Private Gatherings

PROGRAM AGENDA

3.35 PM - 3.50 PM - Economist Perspective

Dr. Alexander Catwright, CEO & Co-Founder, HotelSHIFT

3.50 PM - 4.35 PM - Panel Discussion 2

Topic :

4.35 PM - 4.50 PM - Good Fellows Award (Optional)

4.50 PM - 4.55 PM - Release of The New Age Wealth

Clive Horwood, Managing Editor and Deputy Chief Executive Officer, OMFIF / John Orchard, Chairman, DMI, OMFIF

4.55 PM - 5.00 PM - Vote of Thanks by Michael Maduell, President, SWFI

GALA DINNER

Venue : Grand Atrium, The Star
One Cowboys Way
The Home to Dallas Cowboys

6.00 PM - 7.00 PM - Registration, Networking, Cocktail & Group Photography

7:00 PM - 7:05 PM - Welcome Note by Dipika Patel, Chairwoman, Patel Family Office

7.05 PM - 7.10 PM - Inviting the Industry by Lee Bratcher, President, Texas Blockchain Council

7.00 PM - 7.30 PM - First Course is served

7.30 PM - 7.50 PM - One-on-One Session

Topic and Speaker TBA

7.50 PM - 8.20 PM - Main Course is served

8.20 PM - 8.40 PM - Good Fellows Award

8.40 PM - 9.10 PM - Dessert served

9.10 PM - 9.30 PM - One-on-One Session

9.30 PM - 9.40 PM - Vote of Thanks by Managing Member, Patel Family Office; Chairman, SWFI

9.40 PM - 10.00 PM - Group photo and coffee

POST PARTY CELEBRATION

10:00 PM - 12:00 AM

By Invitation only

Venue: Cowboys Club, The Star, One Cowboys Way

This private gathering is hosted by the Sovereign Wealth Fund Institute, led by the same esteemed team behind landmark events such as the Global Wealth Conference 2024 at the House of Commons, London and SWFI FORT Middle East 2024 at Dubai's iconic Museum of the Future.



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 actual event photographs from the GOOD Fellows Awards Ceremony hosted at SWFI FORT North America 2023 hosted in Dallas at The Star, One Cowboys Way, Frisco. For more information, visit 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).

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).

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).



texasblockchaincouncil.org

The Texas Blockchain Council is a nonprofit industry association working to make the State of Texas the jurisdiction of choice for bitcoin, blockchain, and digital asset innovation.

The TBC also provides business development and client matching opportunities for companies looking to do business in Texas.

Thanks to the recent efforts of the TBC, elected leaders, industry partners in the bitcoin, blockchain, and digital asset community, Texas has been elevated to a position of global leadership in our industry.



omfif.org

OMFIF is an independent think tank for central banking, economic policy and public investment, providing a neutral platform for public and private sector engagement worldwide. With teams in London and the US, OMFIF focuses on global policy and investment themes relating to central banks, sovereign funds, pension funds, regulators and treasuries. Global public investors with investable assets of \$43tn are at the heart of this network.

The OMFIF advisory network actively participates in these activities and is chaired by Lord Meghnad Desai, emeritus professor at the London School of Economics and Political Science.



PATEL FAMILY OFFICE

patelfamilyoffice.org

The Patel Family Office is a third-generation family office with a legacy spanning over 70 years. Starting with cotton syndication in Manchester, UK, the family transitioned to retail and later focused on hospitality in the United States, growing from single hotel ownership to managing extensive portfolios. Recognized as one of the oldest hospitality families in the country, they bring decades of expertise across various segments. Beyond hospitality, they have diversified into real estate, healthcare, technology, fintech, edtech, media, and entertainment, supporting ventures across industries.




greatx.com

GreatX is committed to providing opportunities for individuals to become hotel investors and fulfill their aspiration of owning an asset with long-term returns, earnings, principal protection, hotel real estate investments and asset management. Its women-led & women-managed team comes with a combined experience of 250+ years and a stellar portfolio having managed revenue of \$2 Billion. The team has successfully handled 4 recession cycles with hands-on experience in asset management and operational efficiency.

SWFI EVENTS

GLOBAL EVENTS CALENDAR


2025 PROGRAM



SWFI FORT MIDDLE EAST
JANUARY 21-23, 2025
ABU DHABI | SHARJAH | DUBAI
UAE



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 [fort.global](#) for up to date information.

LEADERSHIP TEAM



LAKSHMI NARAYANAN
Chairman
Sovereign Wealth Fund Institute



DIPIKA PATEL
Chairwoman
Patel Family Office



EDWARD LONGHURST-PIERCE
Chief Executive Officer
SWFI Events



DAVID MARSH
Chairman and Chief Executive Officer
OMFIF



JOHN ORCHARD
Chairman, DMI
OMFIF



PATRICIA HAAS CLEVELAND
US President
OMFIF



CLIVE HORWOOD
Managing Editor and
Deputy Chief Executive Officer
OMFIF



LEE BRATCHER
President
Texas Blockchain Council



VISIONARIES WHO SAW TOMORROW, YESTERDAY.



Dipika Patel with Robert F. Kennedy Jr., incoming Secretary Designate of USA (Department of Health and Human Services)
Actual event photograph taken at SWFI FORT North America 2023



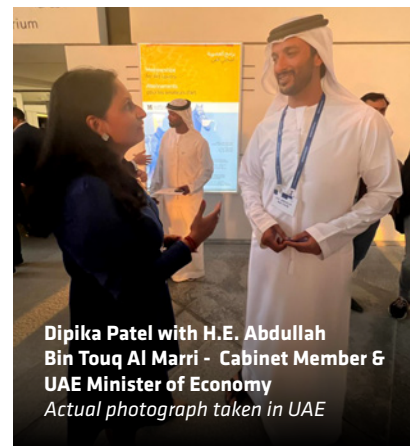
Lakshmi Narayanan and Lee Bratcher with incoming Co-lead of Department of Government Efficiency, USA
Actual event photograph taken at the North America Blockchain Summit 2023



Dipika Patel with Ranil Wickremesinghe - Former President of Sri Lanka
Actual photograph taken in UAE



Dipika Patel with Sadhguru Jaggi Vasudev - Founder of Isha Foundation
Actual photograph taken in UAE



Dipika Patel with H.E. Abdullah Bin Touq Al Marri - Cabinet Member & UAE Minister of Economy
Actual photograph taken in UAE

VISIONARIES WHO SAW TOMORROW, YESTERDAY.



Dipika Patel with Model & Author Maye Musk
Actual event photograph taken at Women Empowerment Gathering in Shanghai



Dipika Patel with David Cameron - Member of the House of Lords of the United Kingdom
Actual event photograph taken at SWFI Fundraising Event in Dubai



Lee Bratcher with Senator Ted Cruz
Actual event photograph taken at Texas Blockchain Summit 2023



Lee Bratcher with Robert F. Kennedy Jr., incoming Secretary Designate of USA (Department of Health and Human Services)
Actual event photograph taken at Summit 2023

"A MUST ATTEND PRIVATE GATHERING TO BUILD RELATIONSHIP CAPITAL,
THE PATHWAY TO YOUR FINANCIAL CAPITAL"

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



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REQUEST INVITATION



JOIN WHATSAPP CHANNEL