

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

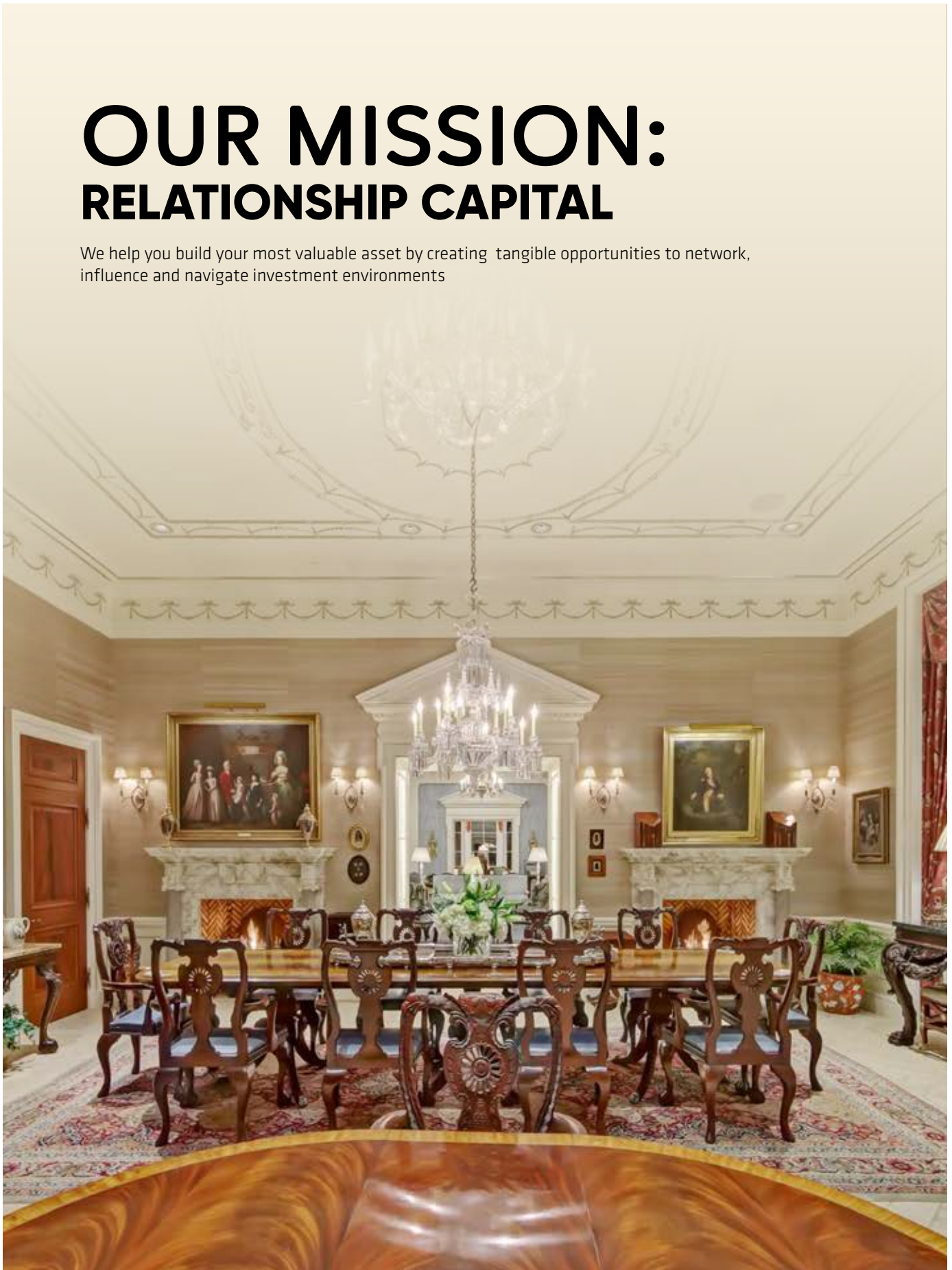
GALA DINNER

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

PRE-EVENT DINNER (INVITE-ONLY)



DATE

11 February 2025

TIME

6:00 PM onwards

Welcome Reception, Networking & Dinner

VENUE

12 Cowboys Way, Frisco, Texas

SWFI PAST EVENTS



“Celebratory Gala Dinner hosted at the House of Commons, London, United Kingdom, in the presence of decision makers controlling assets in excess of USD 6 Trillion”



“Celebratory Gala Dinner hosted at the Museum of the Future, Dubai, in the presence of decision makers controlling assets in excess of USD 2 Trillion”



“Celebratory Gala Dinner hosted at the The Star, One Cowboys Way, Dallas in the presence of decision makers controlling assets in excess of USD 11 Trillion.”

PROGRAM AGENDA - 12 FEBRUARY 2025



BY INVITATION ONLY - PRIVATE LUNCH 1
Industry Leaders Luncheon
Location:
Dining Room at the Pavilion
Timing: 12:00 PM - 2:00 PM
(Seated Lunch)



BY INVITATION ONLY - PRIVATE LUNCH 2
Patel Family Office Lunch
Location:
Board Room at the Old Parkland
Timing: 12:00 PM - 2:00 PM



MAIN EVENT
Location:
Debate Chambers at the Old Parkland
Timing: 2:00 PM - 5:00 PM

1:30 PM - 1:50 PM **Registration**
By invitation only
(Pavilion) Hall opens by 1:55 PM

MAIN EVENT - FIRST SESSION

2:00 PM - 2:05 PM **Opening Remarks by Edward Longhurst-Pierce**, CEO, SWFI Private Gatherings

2:05 PM - 2:10 PM **Opening Note by Lee Bratcher**, President, Texas Blockchain Council

2:10 PM - 2:50 PM **Panel Discussion 1 - 40 mins**
Topic: Tokenization of Real World Assets
Panelists: **William Peck**, Head of Digital Assets, WisdomTree
Bruce Jackson, CFA, Chief of Digital Asset Funds and Business, Apex Group Ltd.
Jim Hiltner, CFA, Co-founder, Head of Business Development, Superstate
Matthew Hougan, CIO, Bitwise Asset Management
Moderator: Anthony Bassili, Head of Asset Allocators, Coinbase Institutional

2:50 PM - 3:10 PM **Topic: Actual Usecase of Real World Asset Tokenization in Real Estate - 20 mins**
Lakshmi Narayanan, Managing Partner, Patel Family Office; Chairman, SWFI
William "Chip" Rogers, CEO, Rogers Capitol Consulting
Moderator: Kim Diamond, Co-founder, GreatX, Board Member of SWFI

3:10 PM - 3:30 PM **Coffee and Tea break**

MAIN EVENT - SECOND SESSION

3:30 PM **Welcoming by Edward Longhurst-Pierce**, CEO, SWFI Private Gatherings

3:30 PM - 3:35PM **Opening Remarks by Dipika Patel**, Chairwoman, Patel Family Office

3:35 PM - 3:40 PM **Setting the tone for the Institutional Adoption of Digital Assets**
Michael Maduell, President, SWFI

PROGRAM AGENDA - 12 FEBRUARY 2025

3:40 PM - 4:20 PM	<p>Panel Discussion 2 - 45 mins Topic: Institutional Adoptions of Digital Assets Panelists: Charles Mounts, Chief DeFi Officer, S&P Global Christopher Jensen, Portfolio Manager & Director of Digital Asset Research, Franklin Templeton Kevin Yedid-Botton, Partner, ParaFi Capital Kokila Alagh, Founder, Karm Legal Consultants Moderator: John Orchard, Chairman, DMI, OMFIF</p>
4:20 PM - 4:35 PM	<p>Fireside Chat Anthony Bassili, Head of Asset Allocators, Coinbase Institutional Christine Moy, Partner, Head of Digital Assets, Data & AI Strategy, Apollo Global Management Inc.</p>
4:35 PM - 4:55 PM	<p>The New Age Wealth - 20 mins Dr Alexander Cartwright, Chief Economic Advisor, GreatX; CEO & Co-founder, HotelSHIFT</p>
4:55 PM - 5:00 PM	<p>Closing Remarks by Lakshmi Narayanan, Managing Partner, Patel Family Office; Chairman, SWFI</p>
5:00 PM	<p>Announcement for Gala Dinner & Group Photo by Edward Longhurst-Pierce, CEO, SWFI Private Gatherings</p>

GALA DINNER

VENUE - Grand Atrium, The Star, One Cowboys Way, Dallas Cowboys Headquarters Atrium, 1 cowboys way, Frisco, Texas

6:45 PM	<p>Doors Open for Resgistration</p>
7:00 PM - 7:05 PM	<p>Opening Remarks by Edward Longhurst-Pierce, CEO, SWFI Private Gatherings</p>
7:05 PM - 7:10 PM	<p>Welcome Note by Dipika Patel, Chairwoman, Patel Family Office</p>
7:10 PM - 7:15 PM	<p>Michael Maduell, President, SWFI</p>
7:15 PM - 7:35 PM	<p>First Course is served</p>
7:35 PM - 7:50 PM	<p>Keynote session Topic: Tokenization from a Regulatory Perspective in the Current Environment Lakshmi Narayanan, Managing Partner, Patel Family Office; Chairman, SWFI Gabriel Benincasa, General Counsel/Chief Compliance Officer and Chief Risk Officer, FundBank</p>
7:50 PM - 8:20 PM	<p>Main Course is served</p>
8:20 PM - 8:50 PM	<p>Topic: Institutional and Family Office Adoption of Digital Assets Lakshmi Narayanan, Managing Partner, Patel Family Office; Chairman, SWFI Anthony Basilli, Head of Asset Allocators, Coinbase Institutional Christine Moy, Partner, Head of Digital Assets, Data & AI Strategy, Apollo Global Management Inc.</p>
8:50 PM - 9:10 PM	<p>Dessert served</p>
9:10 PM - 9:30 PM	<p>Fireside Chat Topic: Why Texas? Lakshmi Narayanan, Managing Partner, Patel Family Office; Chairman, SWFI Aaron Demerson, President and CEO, Texas Economic Development Corporation (TxEDC) Nicole Chambers, Global Managing Director of Listings, Texas Stock Exchange</p>
9:30 PM - 9:40 PM	<p>Vote of Thanks by Lakshmi Narayanan, Managing Partner, Patel Family Office; Chairman, SWFI</p>
9:40 PM - 10:00 PM	<p>Group photo</p>

OUR ESTEEMED SPEAKERS PANEL



Christine Moy,
Partner, Head of Digital Assets,
Data & AI Strategy
Apollo Global Management Inc.



Anthony Bassili,
Head of Asset Allocators,
Coinbase Institutional



Matthew Hougan,
CIO,
Bitwise Asset Management



Christopher Jensen,
Portfolio Manager &
Director of Digital Asset Research
Franklin Templeton



William Peck,
Head of Digital Assets,
WisdomTree



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



Michael Maduell,
President,
SWFI



Kim Diamond,
Board Member,
Sovereign Wealth Fund Institute



Lee Bratcher,
President
Texas Blockchain Council



John Orchard,
Chairman, DMI
OMFIF



Kokila Alagh,
Founder,
Karm Legal Consultants



Jim Hiltner, CFA,
Co-founder, Head of Business
Development, Superstate



Charles Mounts,
Chief DeFi Officer
S&P Global



Dipika Patel,
Chairwoman,
Patel Family Office



Aaron Demerson,
President and CEO,
Texas Economic Development
Corporation (TxEDC)



Bruce Jackson,
Chief of Digital Asset Funds
and Business
Apex Group Ltd.



Nicole Chambers,
Global Managing Director of
Listings, Texas Stock Exchange



Gabriel Benincasa,
General Counsel/Chief Compliance
Officer and Chief Risk Officer,
Fundbank

MANY MORE TO COME...

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).

SWFI FORT 2025 - UAE



Group photo taken at SWFI FORT UAE 2025, Day Two at Sharjah Chamber Commerce and Industry | 22nd February 2025



Lakshmi Narayanan (Chairman, SWFI) with H.E. Sheikh Fahim Bin Sultan Bin Khalid Al Qasimi, Executive Chairman, Dept. of Govt. Relations; Member of The Executive Council of Sharjah



Networking at SWFI FORT UAE 2025 | Day 3, Dubai



Gathering at SWFI FORT UAE 2025 | Day 2, Sharjah



Omar Al Mulla (Chief Executive, Osool Investments, Sharjah Investment Holding) at SWFI FORT UAE 2025 | Day 2, Sharjah



Panel Discussion at SWFI FORT UAE 2025: "Tradition Meets Modernity - Sharjah as a Regional Leader in Economic diversification & Sustainability" | Day 2, Sharjah



Rt Hon Sir Brandon Lewis CBE (Former Lord Chancellor, Secretary of State & British MP) being awarded with the prestigious GOOD Fellows Award by Lakshmi Narayanan (Chairman, SWFI) on Day Two of SWFI FORT UAE



Group photo taken at SWFI FORT UAE 2025, Day One at Manarat Al Saadiyat, Abu Dhabi | 21st February 2025



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.



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.

PARTICIPATING ORGANIZATIONS



MORE TO COME...

SWFI EVENTS

GLOBAL EVENTS CALENDAR

2025 PROGRAM



*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



KIM DIAMOND
Board Member
Sovereign Wealth Fund Institute

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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