TFOA

Serving Single Family Offices Since 2007

Sponsorship Opportunities



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OVERVIEW

We are a private network of Single Family Office principals and senior executives encompassing:

- 15% of billionaires in Texas
- 250 single family office members
- 675 single family offices in global network

Since our founding in 2007, TFOA has led the global single family office community by delivering:

- World-class educational content
- Unique networking opportunities
- Exceptional thought leadership



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OVERVIEW

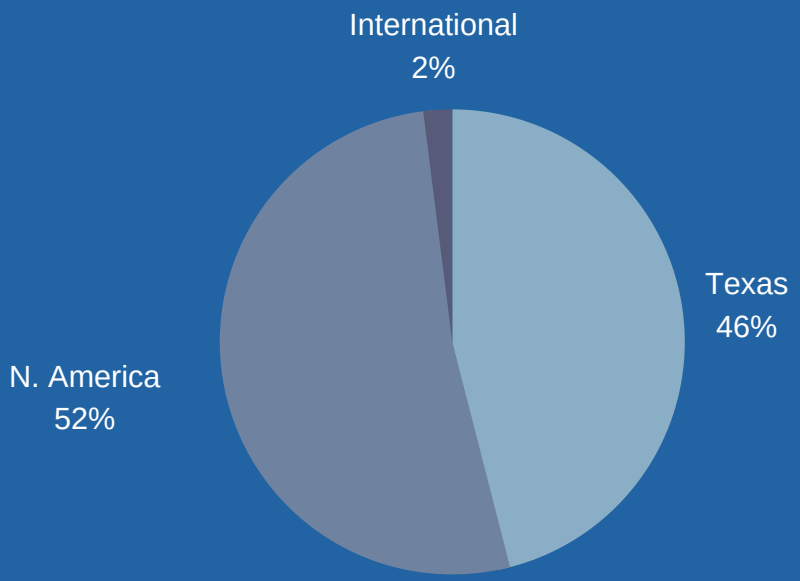
Members of the group are not actively marketing products or services to other members, although co-investment activity does take place.

The group is for education, networking, pooling diligence, selective co-investment, and a resource for family office professionals to share ideas, deal flow and best practice.

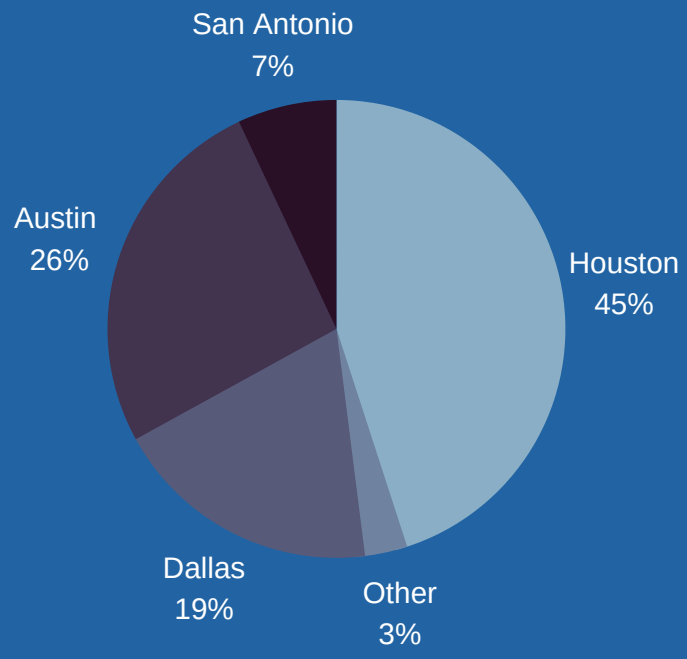
These family groups control large industrial and commercial businesses and have significant investments throughout the world. We host a closed-door, annual symposium for family office principals and professionals and occasionally have outside speakers present to the group.

We adhere to a strict code of conduct: Principles

REGIONAL



TEXAS BY CITY



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INFLUENCE

1 - Annual Symposium

100+ Single family office principals and professionals in attendance

2 - Monthly Update

15K+ Personal contacts of our TFOA founder (TFOA members, CEOs, CIOs, buy side & sell side)

3 - Member Portal

250+ single family offices

4 - Private Events

Virtual and in-person private meetings

5 - Social Media

LinkedIn: 10,000+ Connections
Facebook: 1,500+ Followers

6 - Website

www.tfoatx.com



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SYMPOSIUM



TFOA symposiums are invitation only. For family offices, it's an opportunity to hear from leading practitioners on family office and investment related issues, and to learn about the latest policy research in the fields of public & private investments, real estate, global energy, and range of other family office related topics.

TFOA's annual symposium has become the preeminent annual event for the family office buy-side community to benefit from leading industry research and networking; and allows family offices from around the world to come together as an important community for capital formation and investment.

Prior symposiums have been an enormous success with 100+ single family office principals and professionals in attendance each year. See page 15 for more information.

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PAST SPEAKERS



PETER KRAUS

Aperture Investors



DAVID BONDERMAN

TPG Capital



JOHN GOFF

Goff Capital



ALEX ROEPERS

Atlantic Capital



DICK KRAMLICH

NEA



STANLEY SHOPKORN

Hilltop Park



GARY PETERSEN

Encap



CHARLES TATE

Capital Royalty



ROBERT SINNOTT

Kayne Anderson

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RECENT TESTIMONIALS

"I thought that was a great event - the best family office-only event I've ever attended. Thanks for having me and I look forward to participating in future events." (Austin SFO)

"I thought this was one of the most compelling events I've attended. In some other events, it's partly a sales environment - which can tire me out, candidly. TFOA Symposium was relaxed and allowed for candor/relationship building." (Houston SFO)

"It was definitely worth it and one of the better events I have attended in the past few years. I enjoyed its size (small enough, but with enough scale to make it worthwhile from a networking standpoint)." (Los Angeles SFO)

"The symposium was fantastic - thank you for the hard work and intentionality you put into making it a great event." (Katy SFO)

"This was the best family office conference I've been to so far." (Dallas SFO)

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SPONSORS

What distinguishes TFOA from the many other family office groups is that we're a true peer network of single family office principals and professionals. No registered investment advisors, broker dealers, investment managers, or sales representatives participate in our closed door, private networking sessions and no contact information or email lists will ever be shared.

Our member's privacy is of the upmost importance. One of the very few ways to reach this highly curated audience of ultra-high net worth principals and single family office professionals is by sponsoring our annual Symposium.

Further details on sponsorship levels can be found in the following pages. Prices for each level are available upon request.

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TFOA

Serving Single Family Offices Since 2007

THE UNIVERSITY OF TEXAS AT DALLAS

Single Family Office Symposium*

April 7th, 2021

9:00am – 9:15am CST ***Welcoming Remarks***

Marc J. Sharpe, Chairman of The Family Office Association

9:15am – 10:05am ***Keynote Speaker***

- *Mitch Kapor, Co-Chair, Kapor Center for Social Impact*
- *Moderator: Jackie Kimzey, Associate Professor of Practice, Organizations, Strategy, and International Management*

10:05am – 10:10am *Short Intermission*

10:10am – 11:00am ***Biotech Investing Panel***

- *Racquel Bracken, Partner, Venrock*
- *Andre Perold, CIO, HighVista Strategies*
- *Anat Naschitz, Managing Director, Orbimed Advisors*
- *Moderator: Shalini Prasad, Department Head, Bioengineering*

4:30pm – 6:00pm ***TFOA Member & Sponsor Networking***

April 8th, 2021

9:00am – 9:15am CST ***Welcoming Remarks***

Dr. Richard Benson, President of The University of Texas at Dallas

9:15am – 10:05am ***Future of Energy Panel***

- *Hossam Elbadawy, Managing Director, SCF Ventures*
- *Greg Bird, CEO & President, Jetta Operating Company*
- *David Bailin, Chief Investment Officer, Citi Private Bank*
- *Moderator: Mario Rotea, Professor, Mechanical Engineering*

10:05am – 10:10am *Short Intermission*

10:10am – 11:00am ***Keynote Speaker***

- *Randi Zuckerberg, CEO, Zuckerberg Media*
- *Arielle Zuckerberg, Partner, Coatue Ventures*
- *Moderator: Nancy Fechney, Partner, Flight Ventures*

4:30pm – 6:00pm ***TFOA Member, Sponsor & Attendee Networking***

*Tentative schedule, subject to change

Silver Tier

1. One senior exec to attend all Symposium panel sessions (Day 1 & 2)

2. One senior exec to attend Day 2 networking session

3. Logo on Symposium Brochure (which is posted on TFOA website and distributed to all attendees)

4. Logo on TFOA Monthly Email for 3 months (15K+ contacts per send)

5. Logo on TFOA Website until next Symposium

6. One free membership for qualified SFO client

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Gold Tier

EVERYTHING OFFERED AT SILVER +

1. Logo on screen during Symposium intermissions (100+ family offices)

2. One minute pre-recorded sponsor video to be shared on social media in the weeks leading up to the Symposium

3. One senior exec to attend Day 1 networking session

4. One additional free membership for qualified SFO client (2 total)

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Platinum Tier

EVERYTHING OFFERED AT GOLD +

1. One minute pre-recorded sponsor video hosted on post Symposium landing page

2. One additional senior exec to attend Day 1 & 2 Symposium panel sessions (2 execs total)

3. One additional senior exec to attend Day 1 & Day 2 networking sessions (2 execs total)

4. Thought leadership article for publication, subject to TFOA guidelines, on:
    - TFOA website
    - TFOA LinkedIn Page
    - TFOA Facebook Page

5. One additional free membership for qualified SFO client (3 total)

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Diamond Tier

EVERYTHING OFFERED AT PLATINUM +

1. Private event or webinar opportunity with TFOA members in Dallas or Houston

2. Thought leadership article for publication, subject to TFOA guidelines, on:
    - Distributed via private member Portal to 250+ single family offices
    - Stand-alone email sent directly from our founder to 15k+ personal contacts
    - TFOA website
    - TFOA LinkedIn Page
    - TFOA Facebook Page

3. One additional free membership for qualified SFO client (4 total)

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WORLD CLASS SPONSORS

LAZARD ASSET MANAGEMENT

AllianceBernstein

ORIX

Northern Trust

Goldman Sachs

JPMorgan Chase & Co.

APOLLO

SATORI CAPITAL

KPMG

RSM

Andersen Tax

EY

Grant Thornton

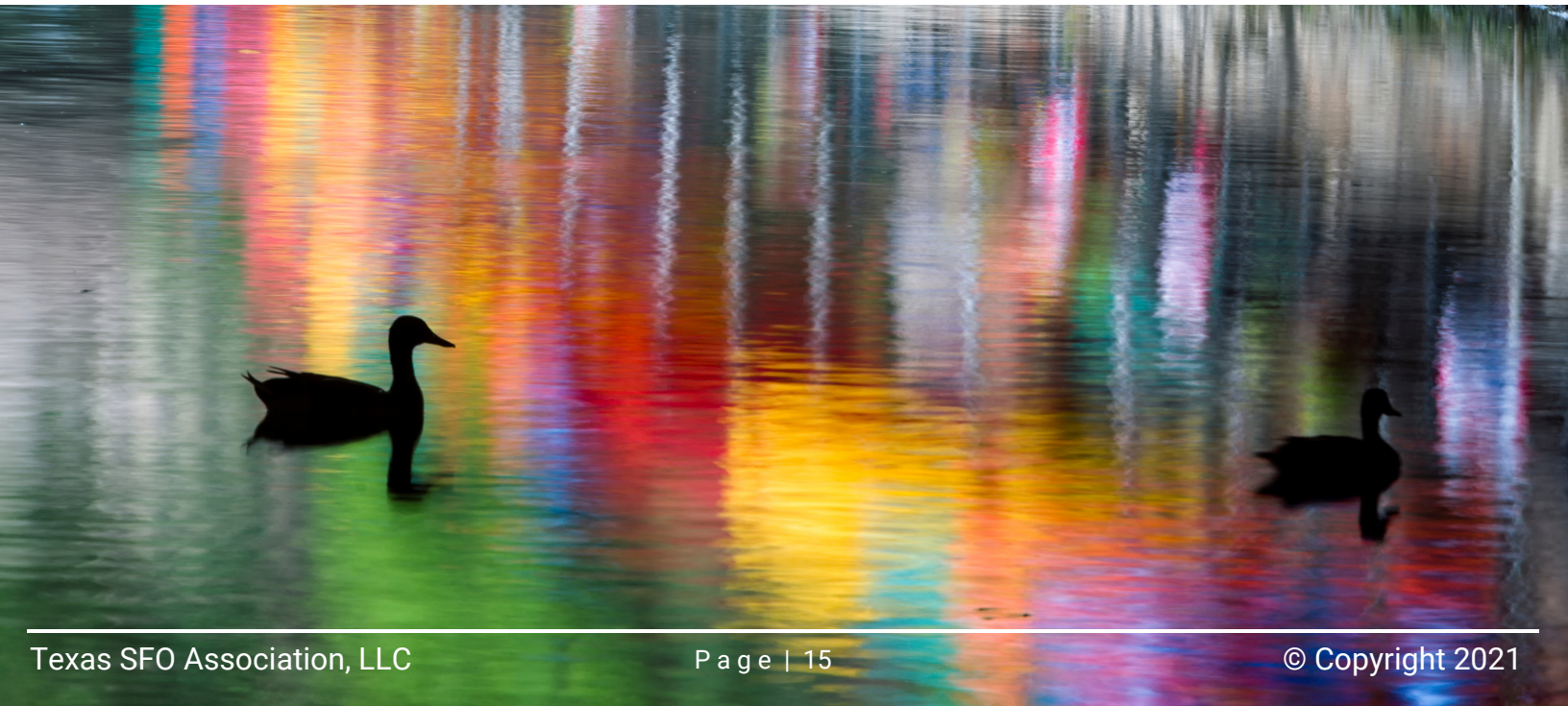
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haynesboone

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PAST SYMPOSIUMS



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TFOA
Serving Single Family Offices Since 2007

SMU | COX

2020 SINGLE FAMILY OFFICE SYMPOSIUM



SMU COX SCHOOL OF BUSINESS
DALLAS, TEXAS

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5th TFOA Single Family Office Symposium

Open Track - Virtual Format*

21st October 2020

9:00am – 9:15am CST	***Welcoming Remarks*** Marc J. Sharpe, Chairman of the Texas Family Office Association
9:15am – 10:05am	***Global Investing Panel*** • *John Frank, Vice Chairman, Oaktree Capital* • *Sunny Vanderbeck, Managing Partner, Satori Capital* • *Peter Marber, Chief Investment Officer, Aperture Investors* • *Moderator: Shane Goodwin, Professor, Associate Dean, Executive Education and Graduate Programs*
10:05am – 10:10am	*Short Intermission*
10:10am – 11:00am	***Real Estate Panel*** • *Michael Levy, CEO, Crow Holdings* • *John Goff, Chairman, Crescent Real Estate* • *Bill Vanderstraaten, Founder, Chief Partners* • *Moderator: Joseph Cahoon, Clinical Professor, Director, Folsom Institute for Real Estate*

22nd October 2020

9:00am – 9:15am CST	***Welcoming Remarks*** Matthew Myers, Dean of Edwin L. Cox School of Business
9:15am – 10:05am	***Energy Panel*** • *Ryan Devlin, Partner, EnCap Investments* • *Chris Carter, Managing Partner, NGP Energy Capital* • *Kevin McCarthy, Managing Partner & Vice Chairman, Kayne Anderson* • *Moderator: Kumar Venkataraman, Professor, Academic Director, Maguire Energy Institute & Kyle Miller Energy Program*
10:05am – 10:10am	*Short Intermission*
10:10am – 11:00am	***Keynote Speaker*** *Peter Kraus, Chairman and CEO of Aperture Investors*
5:00pm – 6:30pm	***TFOA Member, Sponsor & Attendee Networking***

**Welcoming Remarks, Expert Panels and Keynote Speaker delivered via Zoom Webinar. Networking will be delivered via Zoom Meeting breakout rooms with 5 – 10 attendees in each room, rotating every 15 mins. Tentative schedule, subject to change.*

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The University of Texas at Austin
McCombs School of Business

TFOA
Texas Family Office Association

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THE UNIVERSITY OF TEXAS AT AUSTIN
McCOMBS SCHOOL OF BUSINESS

Agenda

AT&T Executive Education and Conference Center, **Room No. 203**

October 17

9:30 – 10:00 am	**Registration & Networking**
10:00 – 10:20 am	**Welcoming Remarks** **Marc J. Sharpe**, Chairman of the Texas Family Office Association **Jay Hartzell**, Dean, McCombs School of Business, Lois and Richard Folger Dean's Leadership Chair, Centennial Chair in Business Education Leadership, Trammell Crow Regents Professor, The University of Texas at Austin
10:25 – 11:20 am	**Economy & Markets Panel** • **Mike Silverman**, Co-Head & Chief Investment Officer, Crow Holdings Capital – Investment Partners • **Michael Pompian**, Founder & Chief Investment Officer, Sunpointe Investments • **Chris Brightman**, Partner, Chief Investment Officer, Research Affiliates • ***Moderator: Sheridan Titman***, *Walter W. McAllister Centennial Chair in Financial Services, Department of Finance, McCombs School of Business*
11:25 am – 12:50 pm	**Sponsored Lunch Reception,** Salon C
1:00 – 1:55 pm	**Entrepreneurship & Innovation Panel** • **Rob Antoniades**, Co-Founder and General Partner at Information Venture Partners • **Joshua Baer**, Founder & CEO, Capital Factory • **Zac Zeitlin**, Managing Partner, New Ground Ventures • ***Moderator: Jim Nolen***, *Distinguished Senior Lecturer, Department of Finance, McCombs School of Business*
2:00 – 2:25 pm	**Break – Networking and Light Refreshments**
2:30 – 3:25 pm	**Private Equity Panel** • **Charles Tate**, Chairman & Founder, CRG LP • **Sunny Vanderbeck**, Managing Partner, Satori Capital • **Mark Ligertwood**, Partner, Dunedin LLP • ***Moderator: Ken Wiles***, *Clinical Associate Professor and Associate Director of the Hicks, Muse, Tate & Furst Center for Private Equity Finance, Department of Finance, McCombs School of Business*
3:30 – 4:00 pm	**Break – Networking and Light Refreshments**
4:00 – 5:00 pm	**Fireside Chat** **David Bonderman**, Chairman & Founding Partner, TPG Capital
5:00 pm	**Symposium Ends**

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3RD ANNUAL FAMILY OFFICE SYMPOSIUM

February 20, 2019

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Texas Family Office Association

RICE | BUSINESS
Jones Graduate School of Business

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*AGENDA Rice Business, McNair Hall, Shell Auditorium

12:00 – 1:00pm	Registration and Networking
1:00 – 1:15pm	**Welcoming Remarks** ▪ Marc J. Sharpe, Chairman, Texas Family Office Association
1:15 – 2:00pm	**Keynote Speaker** ▪ **Allison Thacker,** President, Rice Management Company and Chief Investment Officer
2:00 – 3:00pm	**Economy and Markets Panel** ▪ Richard Levinson, Managing Director, Canaras Capital Management ▪ Josh Mayfield, Managing Director, ORIX Corporation ▪ Mike Silverman, Co-Head, Crow Holdings *Moderator: Barbara Ostdiek, Senior Associate Dean of Degree Programs, Associate Professor of Finance and Statistics, Rice University, Jones Graduate School of Business*
3:00 – 3:30pm	**Break** – Networking and light refreshments
3:30 – 4:30pm	**Real Estate Panel** ▪ Chris Bentley, Chief Executive Officer at Bellatorum Resources ▪ Edward Griffin, Chief Executive Officer, Griffin Partners ▪ Hydie McAlister, Chief Executive Officer, McAlister Interests *Moderator: David Veal, CIO, City of Austin Employee Retirement System*
4:30 – 5:00pm	**Break** – Networking and light refreshments
5:00 – 6:00pm	**Global Energy Panel** ▪ Bill Montgomery, Partner at Quantum Energy Partners ▪ Gary Peterson, Managing Partner, Encap ▪ Sean Rice, Managing Director, SCF Partners ▪ Bob Sinnott, Co-Chairman, Kayne Anderson Capital Advisors *Moderator: Bill Arnold, Professor in the Practice of Energy Management, Rice University, Jones Graduate School of Business*
6:00 – 7:00pm	**Keynote Speaker** ▪ **Jonathan Medved,** Founder and CEO, OurCrowd
7:00 – 9:30pm	Reception and informal networking at private location

**Tentative schedule, subject to change*

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2ND ANNUAL FAMILY OFFICE SYMPOSIUM

February 20, 2018

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Texas Family Office Association

RICE | BUSINESS
Jones Graduate School of Business

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AGENDA

Rice Business, McNair Hall, Shell Auditorium

12:00 – 1:00pm	Registration and Networking
1:00 – 1:15pm	Welcoming Remarks ▪ Marc J. Sharpe, Chairman, Texas Family Office Association
1:15 – 2:00pm	Keynote Speaker ▪ David W. Leebron, President, Rice University
2:00 – 3:00pm	**Economy and Markets Panel** ▪ Anastasia Amoroso, Global Market Strategist, J.P. Morgan ▪ Kathy Fisher, Head of Wealth and Investment Strategies, AllianceBernstein ▪ Keith Lerner, Chief Market Strategist, SunTrust Advisory ▪ Doug Ramsey, Chief Investment Officer, The Leuthold Group ▪ Peter Rodriguez, Dean, Jesse H. Jones Graduate School of Business
3:00 – 3:30pm	Break – Networking and light refreshments
3:30 – 4:30pm	**Innovation and Entrepreneurship Panel** ▪ Audrey Jacobs, Partner, OurCrowd ▪ Ankur Jain, Founder and Chairman, The Kairos Society ▪ Meltem Demirors, Director of Development, Digital Currency Group ▪ Yael Hochberg, Ralph S. O'Connor Professor in Entrepreneurship, Rice University ▪ Rakesh Agrawal, Agrawal Family Limited Partnership
4:30 – 5:00pm	Break – Networking and light refreshments
5:00 – 6:00pm	**Global Energy Panel** ▪ Gary Petersen, Founding Partner, Encap Investments ▪ Bill Montgomery, Partner, Quantum Energy Partners ▪ Chris Carter, Managing Partner, Natural Gas Partners ▪ Bob Sinott, Co-chairman, Kayne Anderson Capital Advisors, LP ▪ Bill M. Arnold, Professor in the Practice of Energy Management
6:00	Symposium Ends
6:15 – 9:30pm	Reception and informal networking at Hotel ZaZa

Chatham House Rules will apply: https://www.chathamhouse.org/about/chatham-house-rule

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RICE UNIVERSITY'S
BAKER INSTITUTE
FOR PUBLIC POLICY

HFOA
Houston Family Office Association, Inc.



INAUGURAL FAMILY OFFICE SYMPOSIUM

Wednesday, February 22, 2017
12:30 pm – 6:30 pm

James A. Baker III Hall
Rice University

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HFOA Houston Family Office Association, Inc.

INAUGURAL FAMILY OFFICE SYMPOSIUM

DRAFT — 02.20.17 / 01:34 PM

Wednesday, February 22, 2017

Opening Remarks

1:00 pm — Welcoming Remarks
Marc J. Sharpe
Chairman, Houston Family Office Association

1:15 pm — State of the Institute
The Honorable Edward P. Djerejian
Director, Baker Institute

Panel I – U.S. Health Policy and Investment under the Trump Administration

Moderator: **Robert Smith**, Director of Investments,The Friedkin Group

2:00 pm — **Vivian Ho, Ph.D.**
Director, Center for Health & Biosciences, Baker Institute

Ronald A. DePinho, M.D.
President, The University of Texas MD Anderson Cancer Center

Charles W. Tate
Chairman and Founder, CRG LP

2:50 pm — Coffee Break

Panel II — Entrepreneurship & Innovation Policy and Investment under the Trump Administration

Moderator: **James Berardo**, CEO and CIO, Darlco Inc.

3:30 pm — **Edward J. Egan, Ph.D.**
Fellow and Director, McNair Center for Entrepreneurship and Innovation, Baker Institute

C. Richard Kramlich
Chairman and Co-founder, New Enterprise Associates (NEA)

4:20 pm — Coffee Break

Panel III — Energy Policy and Investment under the Trump Administration

Moderator: **Jack Kins**, CFO, Stude Investment Partners & Big Covey Exploration LP

5:00 pm — **Michael D. Maher, Ph.D.**
Senior Program Advisor, Center for Energy Studies, Baker Institute

Gary R. Petersen
Managing Partner and Co-founder, EnCap Investments LP

Robert Sinott
Co-chairman, Kayne Anderson Capital Advisors LP

William C. Montgomery
Partner, Quantum Energy Partners

5:50 pm — Cocktail Reception

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