


 FAMILY OFFICE INSIGHTS
facilitated by The Bavelas Group

Peer Insights

R E P O R T

Q&A with Richard Wilson

CEO of Family Office Club.

Principle Series:

Please join Family Office Club for the annual Family Office Club Super Summit in Miami, FL from December 5-6th, 2017. If you care to register, please visit <http://familyoffices.com/super/>.



Family Office Insights sits down with Richard Wilson, CEO of Family Office Club, to discuss the annual Family Office Club Super Summit in Miami, FL that hosts 75 speakers with over 250 family offices, 1,000 investment professionals, and 100 angel & institutional investors for two days of networking and engaging with the most family offices on panels and in a single room than anywhere in the world.

Family Office Insights is a voluntary, “opt-in” collaborative peer-to-peer community of single family offices, qualified investors and institutional investors. If you care to learn more, and perhaps join the community, you are welcome to visit us here at FamilyOfficeInsights.com

Q: Tell us about your background and the Family Office Club.

A: I began my career in risk and wealth management and that is when I started coming across numerous management firms calling themselves “family offices.” It was nearly impossible for me to learn about the crossover between management firms and family offices, without meeting the ultra wealthy face-to-face. Through this, however, I realized that there were numerous inefficiencies in this space on both the buy and sell side. On the family office side, you may have had a liquidity event and are not sure how to start a family office, or been told by a private banker to put all your money in a market that ultimately benefits their bias and interests. When raising capital, I have seen inefficiencies in sourcing great deal flow and talent at all levels of business due to secrecy in best practices and know-how. Now more than ever, family offices are holding themselves out to the public, creating an increasing demand towards the elimination of these inefficiencies. With my experience and expertise in the family office space, I’ve been invited to speak at 150 conferences in 15 different countries, as well as, host conferences globally to help teach the independently wealthy how to put together a family office from scratch. In 2007, I serendipitously founded Family Office Club, which grew from pure demand in this space. Now 10 years later, Family Office Club is laser-focused on solely the creation, growth, and success of family offices all over the world.

Family Office Club has 1,000 events a year, and we already have our first 15 scheduled for 2018. Half of these events are fast-paced boot camps on attracting investors and raising funds. The other half of the events are held every 6-8 weeks, with niche focused gatherings, in areas like real estate and energy. Once a year, we hold a 1,000 person Family Office Club Super Summit, which gathers the most family offices on panels and in a single room than anywhere in the world. There are a lot of wealth management conferences out there, but many have private bankers as their speakers – we focus on the family offices being the main attraction and speakers on stage.

This year, we will be holding our annual Family Office Club Super Summit from December 5-6th in Miami. We will have 75 speakers on stage with over 250 family offices, 1,000 investment professionals, and 100 angel or institutional investors attending. Each qualified speaker presents concise, yet thorough points, leaving the majority of the time for discussion panels and audience engagement.

Q: What are some of the challenges you face in your industry?

A: There are many finance and media conferences out there that claim to do what we do, so getting our message across can present itself as a challenge, but we believe it’s a night and day difference as to what we provide to family offices. Our priority and job is to reach out to our family offices on a daily basis, so we truly live, breathe, and dream about this space, which means we know it backwards and forwards.

Q: How is the Family Office Club Super Summit different from other conferences?

A: We are geared towards putting on medium to large sized conferences, rather than focusing on smaller private luncheons. Our conferences size range from about 200-300 people where 2/3rds of the attendees are looking to raise funds and the remaining 1/3rds are family offices looking for deal flow. There are other conferences and cocktail hours held by law firms, accounting firms, and wealth management firms, but they invite an overwhelming majority of wealth management professionals, or sponsors to be the main speakers. The Family Office Club truly differentiates itself from others and thrives in this saturated market by featuring and highlighting family offices on our panels and discussions. We are so confident in our conferences that there is no risk in attending. We offer a full refund if someone doesn't feel that it was a worthwhile time spent. Last year we had 835 attendees, and no one has asked us for a refund. The benefit outweighs the costs in terms of the connections, network, and knowledge you gain in just 2 days at our Summit.

Q: How are you changing the landscape of your industry?

A: We are changing the landscape by making it more transparent. I believe that the more I share, the more genuine value I give away, in turn, the more I am able to attract family offices and ultra wealthy individuals. People initially experience our brand through one of my many books, or through finding our website, and if they like what they read, they usually engage with us at the conferences. Family Office Club posts content and video on a daily basis to social platforms like LinkedIn. I have also published dozen of books, writing the first book on capital raising and starting single family offices called *The Single Family Office: Creating, Operating & Managing Investments of a Single Family Office*. There is no other company or individual consistently sharing information the way the Family Office Club does.

Q: Who is the ideal attendee for the Family Office Club Super Summit? What can be expected at this conference?

A: We are filling up the last couple of hundred seats now and we have the majority of our speakers booked with all of our discussion panel sponsorships sold out. We are looking to single and multi-family offices to attend, speak, and raise money. If someone has an operations business, independent fund, or is a real estate developer, you can benefit at our Summit. You'll be hearing from over 50 family offices discussing how they like to be approached, how they invest, and on top of that, you're privy to the most up-to-date information in family office trends and investment opportunities. In just 2 days, you get to network with and pitch to almost 1,000 people to raise capital, make a referral, find joint venture partners, and new team or board members.

The Super Summit kicks off on the eve of December 4th for a cocktail hour, and then we have a full day planned from 7:30AM to 6:00PM on December 5th. The next and last day is a half day, ending around noon so that our attendees may also connect and experience Art Basel in Miami.

Q: What's your mission?

A: Our mission is to reshape the family office industry to be more efficient by helping anyone who is learning early on, how to connect with peers, raise capital, or start a family office by continually removing more and more inefficiencies in this space.

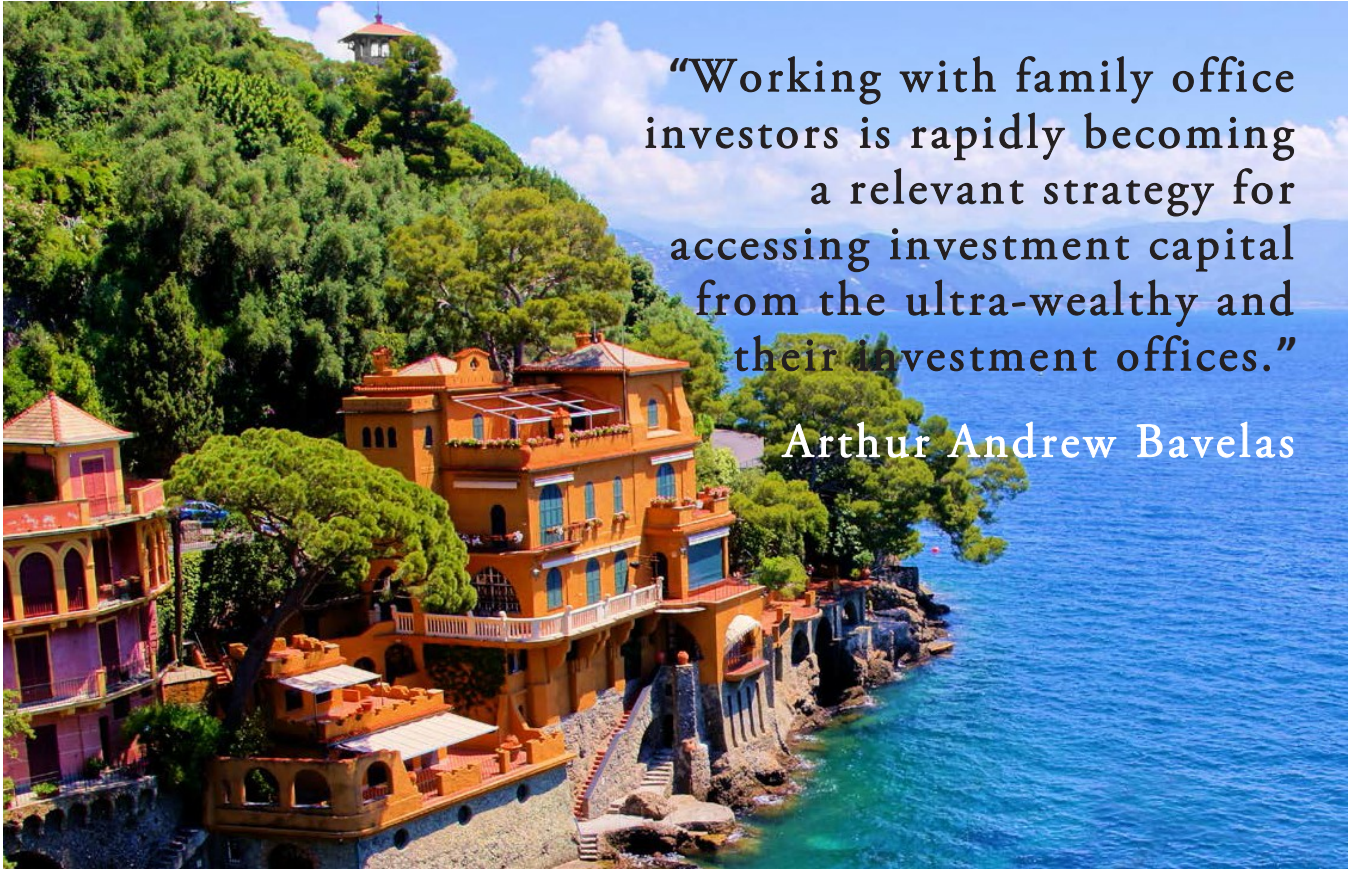
[Please click here to learn more about The Family Office Super Summit.](#)



Richard C. Wilson helps \$100M+ net worth families create and manage their single family offices and currently manages 14 clients including mandates with three billionaire families and as the CEO of a \$500M+ single family office and Head of Direct Investments for another with \$200M+ in assets. The Wilson Holding Company is also the exclusive wine importer and a wine brand representative for Hofkellerei des Fursten Von Liechtenstein, the 600 year old vineyard owned by the princely family of Liechtenstein.

Richard is author of the #1 bestselling book in the family office industry, *The Single Family Office: Creating, Operating, and Managing the Investments of a Single Family Office* and a recently released book called *How to Start a Family Office: Blueprints for Setting Up Your Single Family Office*. Richard has his undergraduate degree from Oregon State University, his M.B.A. from University of Portland, and has studied master's level psychology through Harvard's ALM program while previously residing in Boston. Richard currently resides 10 minutes from downtown Miami on the island of Key Biscayne, Florida with his wife and three daughters.

For more information, please reach out to Richard at Richard@familyoffices.com.



“Working with family office investors is rapidly becoming a relevant strategy for accessing investment capital from the ultra-wealthy and their investment offices.”

Arthur Andrew Bavelas