



Capital Raising Training: Module 1



By Richard C. Wilson

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A Preview of Ideas



Part 1: Systematic & Targeted Capital Raising

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. These shapes are primarily located on the right side of the slide, creating a modern, layered effect.

My Path to Family Offices

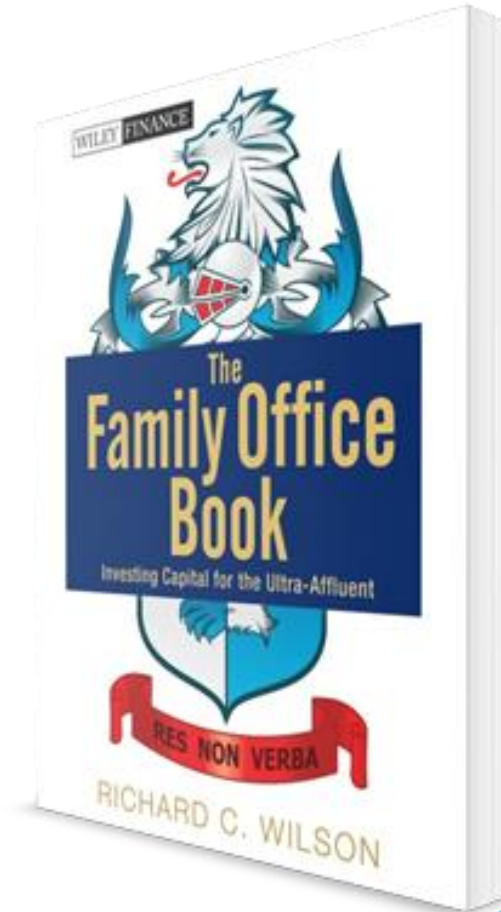


Best Way to Capture HNW Prospects, Don't.

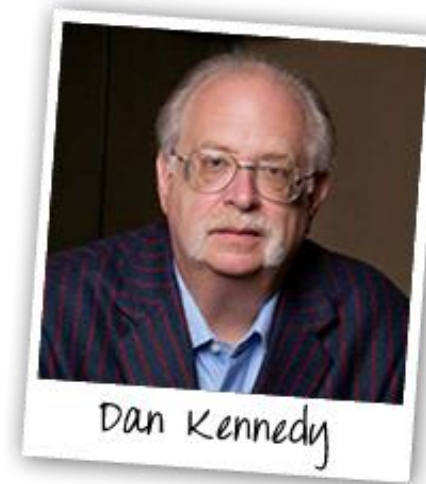


Family Offices Group

1. #1 Global Family Office Association with 72,000 Members
2. 1,800 Articles, 275 Videos, 50+ Hours of Audio Interviews, & Millions of Views
3. Face-to-face meetings with over 1,000 family offices in 15 countries
4. #1 bestselling family office book called The Family Office Book: Investing Capital for the Ultra-Affluent
5. Qualified Family Office Professional (QFOP) training program
6. Billionaire Family Office & Single Family Office Advisory Solutions



Our \$5M+ Three Step Process



Generic Family Office or HNW Strategies



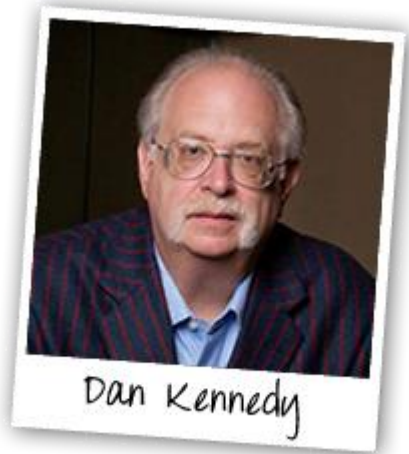
Tightly Define Your Sandbox



Over Invest in Specialization



Become THE Authority





Maturation= Need for Specialization

Selecting Your Sandbox

1. Geographical, Service, Industry, Asset Level Specialization
2. Germany Family Office in New York
3. Billionaire Family Office
4. Wine Fund, Commodity/Energy Fund, etc.



Billionaire Family Office

CIO | Governance | Formation | Board Member

Part 2: My \$100,000 Mistakes



Long Term Mindset



2 Million Person Sandbox



Capital Raising Workshops

We hold full-day intensive capital raising workshops where we walk you through creating a systematic capital raising processes for you and your offering.

Limited to just 100 total professionals, peer capital raisers to network with

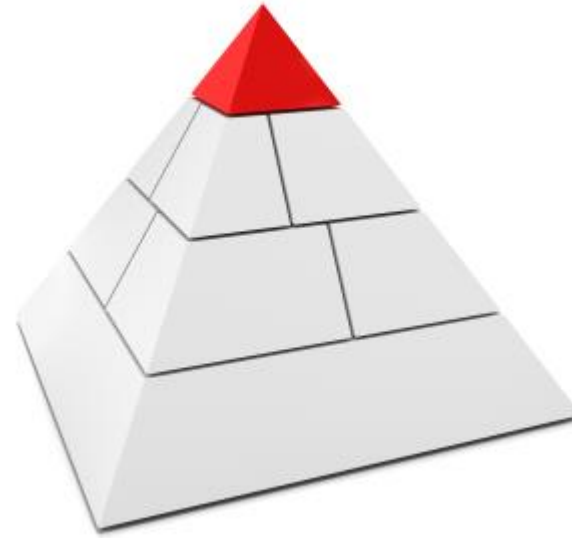
Complete workbook exercises and small group discussions to refine your approach to the 1-2 investor segments you target.

Reserve Your Seat: If you would like to register for our next capital raising workshop please email us at Team@FamilyOffices.com



Summary of Key Points

1. 3 Step Strategy
 - ▶ Define Your Sandbox
 - ▶ Over Invest in Specialization
 - ▶ Be THE expert in your space
2. Long-Term Planning is Key
3. Avoid the Rio beach mistake



Part 3: Questions & Answers



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United Airlines

1 Million+ Miles



Sao Paulo, Brazil