

# NEW AGE WEALTH

12 FEBRUARY 2025 | DALLAS, TEXAS

Hosted by



In Partnership With



TEXAS  
BLOCKCHAIN  
COUNCIL



OMFIF



coinbase

SUPPORTED BY



PATEL FAMILY OFFICE



GREATX  
FULFILLING ASPIRATIONS

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

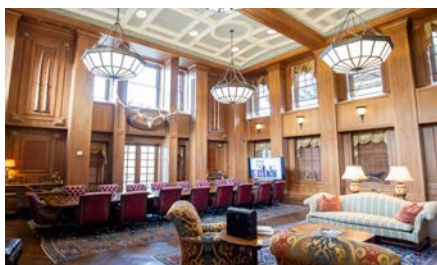
Industry Leaders Luncheon

**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 - 3:35 PM**

**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

<b>3:40 PM - 4:20 PM</b>	<b>Panel Discussion 2 - 45 mins</b> <b>Topic: Institutional Adoptions of Digital Assets</b> <b>Panelists:</b> Charles Mounts, Chief DeFi Officer, SGP 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
<b>4:20 PM - 4:35 PM</b>	<b>Fireside Chat</b> <b>Anthony Bassili</b> , Head of Asset Allocators, Coinbase Institutional <b>Christine Moy</b> , Partner, Head of Digital Assets, Data & AI Strategy, Apollo Global Management Inc.
<b>4:35 PM - 4:55 PM</b>	<b>The New Age Wealth - 20 mins</b> <b>Dr Alexander Cartwright</b> , Chief Economic Advisor, GreatX; CEO & Co-founder, HotelSHIFT
<b>4:55 PM - 5:00 PM</b>	<b>Closing Remarks by Lakshmi Narayanan</b> , Managing Partner, Patel Family Office; Chairman, SWFI
<b>5:00 PM</b>	<b>Announcement for Gala Dinner &amp; Group Photo by Edward Longhurst-Pierce</b> , CEO, SWFI Private Gatherings

## GALA DINNER

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

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



## 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](https://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



Gathering at SWFI FORT UAE 2025 | Day 2, Sharjah



Networking at SWFI FORT UAE 2025 | Day 3, Dubai









[texasblockchaincouncil.org](https://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](https://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](https://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](https://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

**APOLLO****TXSE**  
TEXAS STOCK EXCHANGE **Blockchain.com****Bitwise®** **STATE STREET** **Superstate****S&P Global**

MORE TO COME...

## SWFI EVENTS

## GLOBAL EVENTS CALENDAR

### 2025 PROGRAM

**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

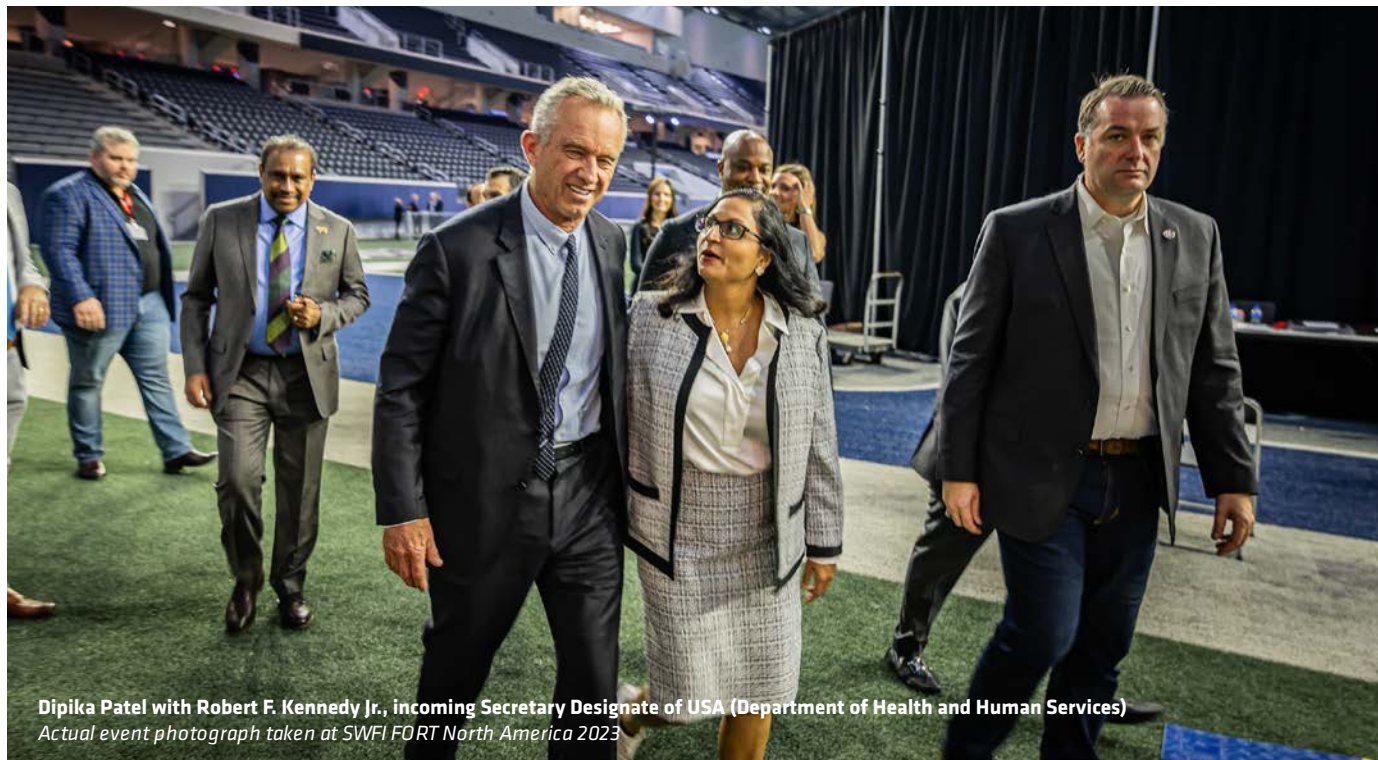


**KIM DIAMOND**

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.



"A MUST ATTEND PRIVATE GATHERING TO BUILD RELATIONSHIP CAPITAL,  
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HOSTED BY



IN PARTNERSHIP WITH



SUPPORTED BY



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



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