



FORT



# NORTH AMERICA

2023

Bringing Together  
Global Investors Drawn to Texas  
Texans Investing at Home and  
Going Global

PRESENTED BY





FORT

NORTH AMERICA 2023

# AN **invitation**

ONLY EVENT

OCTOBER 9 & 10, 2023

**1**

DAY POWER  
PACKED EVENT

**1**

TRILLION USD  
AUM HALL

**1**

GLOBAL HEADQUARTERS  
OF THE WORLD'S RICHEST  
SPORTS TEAM

**250**

SELECTIVE  
INVITED GUESTS

**1**

STAGE AND  
1 COMMON THEME

**32**

PROMINENT  
SPEAKERS

**4**

ILLUMINATING PANEL  
DISCUSSIONS

**4**

GOOD FELLOWS  
AWARD RECOGNITION

**6**

HIGHLY ENGAGING  
NETWORKING SESSIONS

**5**

EXCLUSIVE  
PRIVATE DINNERS

**1**

EXTRAVAGANZA  
ENTERTAINMENT EVENING

**3**

KEYNOTE  
SPEECHES



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# who

## WILL BE ATTENDING?

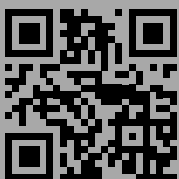
### KEY DECISION MAKERS FROM -

Global Sovereign Wealth Funds	American Sovereign Wealth Funds
Sovereign Development Funds	Public & Pension Funds
Endowments	Families behind the family offices
Successful Entrepreneurs	Large Financial Institutions
Federal Banks	Policy Makers & Politicians
Athletes & Public Influencers	Hedge Funds
Real-estate Funds	Large Allocators
Asset Managers	Media & Publications
Academic Institutions	RIAs & Regulators
Prominent CEOs	Fortune 500 companies
Wealth Advisers	and many more...

Register at [www.fort.global](http://www.fort.global) to apply for invitation.

This is an invitation-only event.

**Scan QR code to visit website for registration**







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# AN Iconic

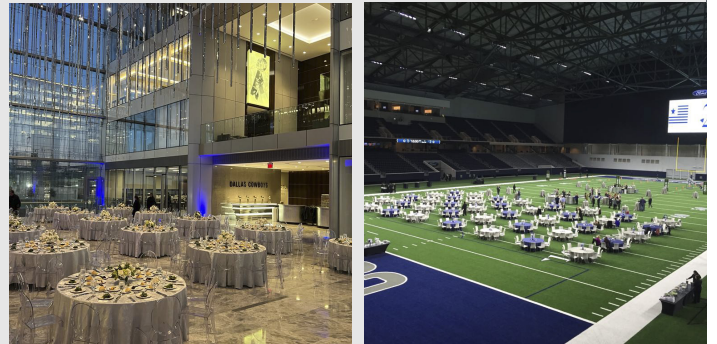
VENUE FOR THE NEXUS OF  
PUBLIC AND PRIVATE WEALTH



The Star, One Cowboys Way, Frisco, Texas  
(Global headquarters of the  
Dallas Cowboys)

FORT Dallas is set to take place in The Star, the state-of-the-art headquarters of five-time Super Bowl Champions the Dallas Cowboys at One Cowboys Way, Frisco, Texas.

FORT is committed to selecting locations renowned for their iconic status or historical importance, such as the Palace of Westminster, home to the Elizabeth Tower that houses the bell known as Big Ben, and the UK Government.







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# bespoke

FORMAT  
MAXIMIZES INVESTMENT  
INTERACTIONS

SWFI events offer a blend of heavy-hitting panel discussions and plenary sessions with regular networking opportunities and social interactions to maximize time spent exchanging views and sharing best practices while creating new linkages and deepening existing relationships.



Images from SWFI Global Wealth Conference, May 31 – June 1, 2023, City of London.

Please visit [www.gwc.events](http://www.gwc.events) to know more



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# PROGRAM AGENDA

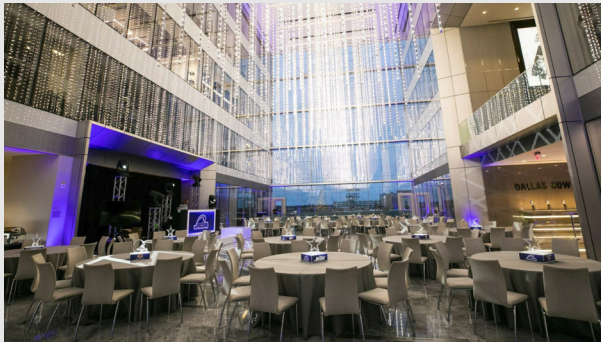
## FORT NORTH AMERICA 2023, DALLAS, TX

### DAY 1, OCTOBER 9

7:00 – 10:00 PM:

#### Welcome Reception and Private Dinner

Experience the evening at the Grand Atrium Hall of Fame, the home to Dallas Cowboys Super Bowl trophies and rings, with the nameplates and quotes from Dallas Cowboys legends embedded in exquisite Italian marble flooring, illuminated with 19,200 LED lights.



Pre-event cocktail reception

Invitation-only seated dinner

First keynote address by a prominent personality

Setting the tone for the FORT North America event opening

Musical entertainment

*\*The above program agenda is only for reference purpose. The dates and the location have been finalized. FORT Global will publish the final agenda on its website [www.fort-global](http://www.fort-global), on September 20th, 2023*



Images from SWFI Global Wealth Conference, May 31 – June 1, City of London.  
Please visit [www.gwc.events](http://www.gwc.events) to know more



# PROGRAM AGENDA

## FORT NORTH AMERICA 2023, DALLAS, TX



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### DAY 2, OCTOBER 10

**8:00 – 9:00 AM:**

#### **Registration and Networking Breakfast**

- Registration for all participants
- Networking opportunity to meet fellow investors, asset owners, and industry professionals
- Seated continental breakfast

**9:00 - 9:15 AM:**

#### **Opening Remarks**

- Introduction to the event and overview of the agenda

**9:15 AM - 10:00 AM:**

#### **Panel 1: Private Equity Trends and Opportunities for 2023 and Beyond**

##### **The Intersection of Private Equity and Family Offices:**

As family offices pivot towards private equity for its diversification and growth benefits, it's pivotal to grasp the distinct challenges and opportunities at this intersection. Join our elite panel, featuring luminaries from the private equity sector and seasoned family office advocates, as they share strategies for investment success, risk-adjusted growth, and alignment with the overarching goals of family offices.

**10:00 AM - 10:45 AM:**

#### **Entrepreneurial Pitches**

Explore, understand, and engage with six businesses, five minutes each elevator pitches at the main stage, that have surpassed the USD 100 Million-mark post-Series A valuation and exhibit a reliable business strategy, making them prime candidates for institutional capital, having previously attracted significant investments

**10:45 AM – 11:15 AM:**

#### **Morning Networking with Coffee Break**

It's time for casual introductions, exchange of business cards, one-on-one meetings, connecting over common interests, setting up follow-up meetings

**11: 15 AM – 11:35 AM:**

#### **Second Keynote Address**

**11:35 AM – 11:45 PM:**

#### **GOOD Fellow Award felicitation and GOOD Talk One**

##### **Inspiring one-to-one conversation with a GOOD Fellow**

Visionary thought leader, purpose-driven influencer, steward of sustainable prosperity, committed to collective progress, responsible wealth allocator, advocate for sustainable action, champion of meaningful networks, custodian of knowledge, architect of legacy, egalitarian at heart, harbinger of ethical power, strategist of synergized impact

# PROGRAM AGENDA

FORT NORTH AMERICA 2023, DALLAS, TX



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NORTH AMERICA 2023

## DAY 2, OCTOBER 10

**11:55 AM – 12:40 PM:**

### **Panel 2: Capital Convergence: Family Office Deal Flow and Institutional Co-investment Landscape**

#### **Collaborative Investing Unveiled: Reshaping Strategies for Family Offices and Sovereign Wealth Funds:**

With its emphasis on distinct investment routes, optimized cost solutions, and diversified avenues, co-investing is setting new benchmarks. Dive into an engaging dialogue led by the thought leaders of the family office community and institutional investment stalwarts, focusing on the essence of combined investment initiatives, fostering valuable ties, and utilizing shared expertise for exceptional returns.

**12:40 PM – 1:00 PM:**

### **GOOD Fellow Award felicitations and GOOD Talk Two**

Inspiring one-to-one conversation with a GOOD Fellow

**1:00 PM – 2:30 PM:**

### **Seated five course lunch, with exclusive Texan cuisine**

A quintessential five-course Texan dining experience, a balance of classic and contemporary, adapted to guests' preferences and allergies, concocted by culinary maestros and served with elegance.

- Icebreaker Activities
- Lunchtime Presentation
- Rest and Recharge
- Informal Discussions

**2:30 PM – 2:45 PM:**

### **Third Keynote Address**

**2:45 PM – 3:30 PM:**

### **Panel 3: How are Family Offices, Sovereign Wealth Funds and Endowments Navigating Global Real Estate Investing?**

Real Estate Investment Dynamics for Family Offices and Sovereign Wealth Funds: With the incoming commercial RE debt wall and changes in workforce behavior, family offices have had to navigate a once-simplistic asset class of allocating capital. Property investments have long been a cornerstone of family office portfolios, offering a tangible and resilient asset class with the potential for attractive risk-adjusted returns. This discussion gathers eminent real estate professionals and delegates from established family offices, sovereign wealth funds, and endowments to dissect both traditional and contemporary investment methodologies, such as asset-backed tokens and structured financial instruments.

**3:30 PM – 3:50 PM:**

### **GOOD Fellow Award felicitations and Good Talk Three**

Inspiring one-to-one conversation with a GOOD Fellow

**3:50 PM – 4:20 PM:**

### **Afternoon Coffee Break**

An opportunity to socialize, catch up, discuss current events, and generally enjoy each other's company in a relaxed setting.

**4:20 PM – 4:40 PM:**

### **GOOD Fellow Award felicitations and Good Talk Four**

Inspiring one-to-one conversation with a GOOD Fellow





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# PROGRAM AGENDA

## FORT NORTH AMERICA 2023, DALLAS, TX

### DAY 2, OCTOBER 10

**4:40 PM – 5:25 PM:**

#### **Panel 4: The Nexus of Private Capital and Sovereign Wealth Funds and Public Funds**

Sovereign wealth funds, the guardians of monumental national assets, play a pivotal role in shaping global financial dynamics. By entwining their objectives with those of local businesses, SWFs can amplify the ripple effect of economic progression. This esteemed panel, boasting voices from SWFs, family offices, and developmental think tanks, will delve into the multifaceted benefits of such a nexus. The dialogue will center on bolstering entrepreneurial landscapes, birthing innovative solutions, and charting a trajectory of sustained economic affluence.

**5:25 PM – 5:45 PM:**

#### **GOOD Fellow Award felicitation and Good Talk Five**

Inspiring one-to-one conversation with a GOOD Fellow

**5:50 PM – 6:00 PM:**

#### **Closing Remarks and Announcements**

**6:30 PM – 9:30 PM:**

#### **Private Dinners**

Four private dinners, by invitation only, hosted at different locations and specially convened to bring together participants into relevant interest groups, promoting in-depth discussions. Family office investors discuss their strategies in private equity. Exchange ideas and insights on successful investment approaches.



*\*The above program agenda is only for reference purpose. The dates and the location have been finalized. FORT Global will publish the final agenda on its website [www.fort.global](http://www.fort.global), on September 20<sup>th</sup>, 2023*



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NORTH AMERICA 2023

TEXAS'S ECONOMIC GROWTH VS. THE U.S.

URBAN DEVELOPMENT IN TEXAS CITIES VS. U.S. METROPOLISES

INVESTING IN TEXAS'S ACADEMIC AND RESEARCH INSTITUTIONS

SILICON HILLS VS. SILICON VALLEY

BIOTECH & MEDICAL INVESTMENTS IN TEXAS

INVESTING IN TEXAS'S RICH FARMLANDS

TEXAS AS A GLOBAL GATEWAY TO TRADE

TEXAS: TECHNOLOGICAL PROWESS

TEXAS: GLOBAL MINDSET

OPPORTUNITIES IN RENEWABLE INVESTMENTS IN TEXAS

FRISCO'S REAL ESTATE FRENZY VS. WACO'S CULTURAL AND TOURISTIC REVIVAL

MCGALLEN'S AGRICULTURAL IMPACT VS. BROWNSVILLE'S MARITIME MIGH

INVESTING IN TEXAN ARTS, MEDIA, AND ENTERTAINMENT

## TOPICS OF DISCUSSION AT FORT NORTH AMERICA

TEXAS AS A WORK-LIFE BALANCE HAVEN

TEXAN TOURISM AND HOSPITALITY

TEXAS VS. CALIFORNIA

TEXAS'S GDP GROWTH VS. NORTHEASTERN STATES

WHY FAMILIES AND BUSINESSES CHOOSE TEXAS OVER THE MIDWEST

TEXAS'S INDUSTRIAL VS. THE BOOM SOUTHERN STATES

TEXAS VS. THE RUST BELT

INFRASTRUCTURE INVESTMENTS

BUSINESS-FRIENDLY TEXAS VS. THE PACIFIC NORTHWEST IN REGULATION

TEXAS'S EMERGENCE AS A FINANCIAL HUB VS. TRADITIONAL CENTERS

RENEWABLE ENERGY GROWTH VS. FOSSIL FUEL

TEXAS'S ECONOMIC RECOVERY POST-PANDEMIC VS. THE U.S. AVERAGE

AUSTIN'S TECH BOOM VS. SAN ANTONIO'S TOURISM AND MILITARY ECONOMY

HOUSTON VS. DALLAS: ENERGY TITANS AND FINANCIAL MAGNATES

TEXAN ENTREPRENEURIAL SPIRIT

TEXAS INFRASTRUCTURE DEVELOPMENT

TEXAS: STRONG PUBLIC-PRIVATE PARTNERSHIPS

TEXAS: TOP QUALITY EDUCATIONAL INSTITUTIONS

FORT WORTH'S CULTURAL ARTS VS. EL PASO'S BORDER TRADE DYNAMICS

GALVESTON'S PORT DOMINANCE VS. CORPUS CHRISTI'S INDUSTRIAL RESURGENCE

INNOVATION IN TEXAS VS. THE ATLANTIC SEABOARD

A TALE OF TWO EDUCATION HUBS: COLLEGE STATION & LUBBOCK

ARLINGTON'S ENTERTAINMENT EVOLUTION VS. PLANO'S CORPORATE MAGNETISM

TYLER'S ROSE INDUSTRY VS. AMARILLO'S LIVESTOCK LEGACY

ROUND ROCK'S TECH-DRIVEN SURGE VS. DENTON'S COLLEGE TOWN ECOSYSTEM





DALLAS  
COWBOYS'  
REMARKABLE

# performances

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AT FORT GLOBAL

The Dallas Cowboys Rhythm & Blue is a two-part entertainment entity consisting of a high-energy co-ed dance team and dynamic drumline. Anticipated to bring their electrifying performances to FORT Global, the Dallas Cowboys are expected to leave a lasting impression with their awe-inspiring displays of athleticism and skill. Throughout their upcoming tenure in this prestigious venue, they are poised to captivate fans and rivals alike with their exceptional talent and unwavering determination.

From their electrifying offense to their impenetrable defense, the Cowboys are anticipated to showcase why they are a force to be reckoned with in the world of American football. Their ability to execute precise plays, combined with their unwavering determination, is likely to result in a series of memorable victories that will be etched into the annals of sporting history.

DALLAS COWBOYS

# RHYTHM & Blue



# TEXAS HAS ALL THE RIGHT REASONS TO HOST **FORT** NORTH AMERICA 2023



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Texas is the headquarter of headquarters for **Fortune 500 companies** Home for **1,000 funds**, with total assets under management of over \$1 trillion.

**GDP:**

USD 1.9 TRILLION

**2<sup>ND</sup>**

LARGEST ECONOMY IN THE US

**9<sup>TH</sup>**

LARGEST **ECONOMY** IN THE WORLD AND  
29<sup>TH</sup> LARGEST **LAND MASS** IN THE WORLD

**8<sup>TH</sup>**

LARGEST ECONOMY IN  
**PURCHASING POWER PARITY (PPP)**

**USD 375**

BILLION WORTH OF **EXPORTS**

**31 MILLION:**

SECOND **POPULOUS** STATE IN THE US

**695,620**

SQUARE KILOMETERS: **SECOND LARGEST**  
STATE IN THE US

**55 FORTUNE 500**

**COMPANIES** CALL TEXAS  
HOME

**1.5**

MILLION **HNWIs**

**100,000**

**UHNWIs**

**750**

**FAMILY OFFICES** (APPROX.) MANAGING AN  
AVERAGE OF USD 100 MILLION IN ASSETS

**1000+**

**ASSET MANAGERS** MANAGING AVERAGE  
ASSETS WORTH USD 1 BILLION

**10**

**LARGE PUBLIC PENSION FUNDS**, WITH TOTAL  
ASSETS UNDER MANAGEMENT OF OVER  
\$500 BILLION

**20**

**ENDOWMENTS**, WITH TOTAL ASSETS UNDER  
MANAGEMENT OF OVER \$100 BILLION

**500**

**PRIVATE EQUITY FUNDS**, WITH TOTAL ASSETS  
UNDER MANAGEMENT OF OVER \$500 BILLION

**200**

**VENTURE CAPITAL FUNDS** WITH TOTAL ASSETS  
UNDER MANAGEMENT OF OVER \$100 BILLION

**1,000**

**BANKS**, WITH TOTAL ASSETS OF OVER  
USD 1 TRILLION

**500**

**CREDIT UNIONS**, WITH ASSETS OF OVER  
USD 100 BILLION

**1,000**

**INVESTMENT FIRMS**, WITH ASSETS UNDER  
MANAGEMENT OF OVER USD 1 TRILLION

**1,000**

**INSURANCE COMPANIES**, WITH ASSETS OF OVER  
USD 1 TRILLION

**919**

REGISTERED INVESTMENT ADVISORY FIRMS

**216**

REGISTERED BROKER  
DEALERS

**26**

REAL ESTATE INVESTMENT  
TRUSTS (REITS)

# ABOUT SWFI



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NORTH AMERICA 2023

FORT Global event is brought to you by SWFI. The event is hosted by the same prominent team that led Global Wealth Conference 2023, inside the UK parliament and the iconic GuildHall.

## 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.

**75+**

PRIVATE GLOBAL EVENTS

**750+**

TOPICS DISCUSSED

**60+**

CITIES

**300+**

NETWORKING DINNERS

**20+**

COUNTRIES

**70+**

SOVEREIGN WEALTH FUNDS

**12,000+**

DELEGATES

**50+**

REGULATORY ORGANIZATIONS

**1,000+**

INSTITUTION PARTICIPATION

**500+**

FAMILY OFFICES

**600+**

PROMINENT SPEAKERS

**300+**

ENDOWMENTS AND MORE





AWARD PRESENTATIONS AND GOOD TALKS



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NORTH AMERICA 2023

## Global Order of Outstanding Disruptors (GOOD) Fellows Awards Winners at Global Wealth Conference, London 2023



### LORD MEGHNAD DESAI

AN INTELLECTUAL BEACON:  
NAVIGATING THE CONFLUENCE OF  
ECONOMICS, ACADEMIA, AND POLITICS  
WORLD RENOWNED ECONOMIST



### VIVEK ANAND OBEROI

A RENAISSANCE MAN OF THE  
MODERN ERA, WORLD RENOWNED  
ACTOR, PHILANTHROPIST AND  
INVESTOR



### JITENDRA BISSESSUR

A RENOWNED VETERAN WITH  
PRECISION AND ACUMEN IN  
GLOBAL WEALTH



### MATTHEW HURN OBE

A CHAMPION OF BREAKTHROUGHS  
AND INNOVATIONS IN GLOBAL  
WEALTH



### LORD MAYOR NICHOLAS LYONS

THE STALWART ENVOY OF LONDON'S  
ECONOMIC PROSPERITY



### DAVID PAPAZIAN

THE VANGUARD OF SUSTAINABILITY  
AND NATIONAL PROGRESS: HARNESSING  
RENEWABLES FOR A BRIGHTER FUTURE



### H. E. UDAYA INDRARATHNA

A LUMINOUS FORCE IN LEADERSHIP  
DEVELOPMENT AND INTERNATIONAL  
DIPLOMACY: CHARTING NEW TERRAINS IN  
WEALTH MANAGEMENT AND EXECUTIVE  
COACHING



### ABDUREHMAN EID TAHIR

A SYMBOL OF PROGRESS:  
PIONEERING NEW HORIZONS  
IN ETHIOPIA'S INVESTMENT  
LANDSCAPE

These are actual photographs  
taken from SWFI Global Wealth  
Conference Event, hosted by  
the same team on May 31<sup>st</sup> 2023  
in the city of London. Please  
visit [www.gwc.events](http://www.gwc.events),  
[www.swfi.com](http://www.swfi.com) and  
[www.swfinstitute.org](http://www.swfinstitute.org)  
to know more.

# GOOD FELLOWS

## AWARDS: TEXAS WELCOMES GLOBAL IMPACT



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**Internationally acclaimed for acknowledging individual contributions to creating GOOD impact with their resources, including wealth, knowledge, and power, the GOOD Fellows is set to be held at the global headquarters of the Dallas Cowboys football team, as part of the FORT Global event.**

Historically held within the UK Parliament, this is its maiden journey outside to Texas.

The GOOD Fellows Awards honor remarkable individuals for their unique contributions. These individuals have pioneered responsible and innovative shifts, promoting growth and sustainability. The Good Fellows environment is characterized by its emphasis on knowledge dissemination and stimulating discourse among visionary individuals. The event will witness four exemplary contributors celebrated in Texan fashion.



**The GOOD Fellows Awards are a not-for-profit initiative from SWFI that not only establishes a motivational stage but also redirects the path of wealth and its influence on society.**

Integral to this mission is the Good Talk series, which sparks profound discussions among the Good Fellows. The Good Talk series is a fundamental segment, nurturing profound conversations among these luminaries. Beyond being a mere platform, its ambition is to recalibrate wealth's trajectory and its societal ripple effects.



MOST  
**RECENT EVENT**  
MAY 30TH - JUNE 1ST, LONDON



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Images from SWFI Global Wealth Conference, May 31 - June 1, City of London.  
Please visit [www.gwc.events](http://www.gwc.events) to know more



# SWFI GLOBAL EVENTS CALENDAR



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NORTH AMERICA 2023

## 2023 EVENTS



### Global Wealth Conference

May 30, 31 & June 1  
London,  
EUROPE



### FORT Dallas

October 9 & 10  
Texas,  
NORTH AMERICA



### G20 SILC 2023

October 25, 26 & 27\*  
Mumbai,  
INDIA



### COP 28 FORT 2023

December 2 & 3\*  
Dubai,  
UAE

## 2024 EVENTS



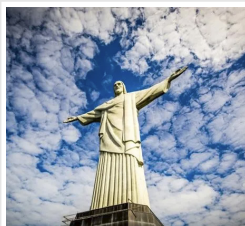
### Global Family Office Summit 2024

March, 4, 5 & 6\*  
Riyadh,  
Kingdom of Saudi Arabia



### Global Wealth Conference 2024

May 28, 29 & 30\*  
London,  
United Kingdom



### G20 SILC

July, 15, 16 & 17\*  
Rio,  
Brazil



### FORT MENA

October 14, 15 & 16\*  
Dubai,  
UAE

\*PROPOSED DATES AND LOCATION YET TO BE ANNOUNCED



# SWFI LEADERSHIP TEAM



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# FORT

FAMILY OFFICE ROUND TABLE

[www.fort.global](http://www.fort.global)  
[www.gwc.events](http://www.gwc.events)  
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[www.swfinstitute.org](http://www.swfinstitute.org)



Scan QR code to visit website for registration

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