

2025 LEADERSHIP SUMMIT

Wednesday, April 23
Wynn Las Vegas

4:45PM – 5:00PM
Sunset Terrace

Emigrant Executive Welcome
Jenny Souza, CEO, Emigrant Partners

5:00PM – 8:00PM
Sunset Terrace

Cocktail Reception & Welcome Dinner

Thursday, April 24
Wynn Las Vegas

8:00AM – 8:45AM
Chambertin

Breakfast

8:45AM – 9:00AM
Alsace

Spotlight: Growth & Opportunity
Jenny Souza, CEO, Emigrant Partners

9:00AM – 9:45AM
Alsace

Setting the Stage: Strategic Drivers of Growth & a View into the Emigrant Network
Mark Bruno, Managing Director & Head of Strategic Advisory, Emigrant Partners
Jason Ehrlich, Managing Director & Head of Investments, Emigrant Partners

9:45AM – 10:30AM
Alsace

Dynamic Management & the Enduring Advisory Firm
Mark Tibergien, Board Member, E&Y, Pathstone, Nesvold Capital Partners
Moderated by **Peter Nesvold**, Managing Partner, Nesvold Capital Partners

10:30AM – 11:00AM
Alsace

Refreshments & Networking Break

11:00AM – 12:30PM
Alsace

Megatrend Power Sessions: Focused, 20min. Sessions

- **Cracking the Code: Organic Growth & Digital Marketing** – Jason Carver, CFO, Pure Financial
- **The Future of M&A in Wealth Management** – Peter Raimondi, CEO, Dakota Wealth Management
- **Capturing the Value of AI in Innovation: the Key Tech Platform Shift of our Time** – Matthew Harrigan, CEO, Company Ventures
- **Developing the NextGen of Leadership** – Ray Sclafani, CEO, ClientWise

12:30PM – 1:30PM
Chambertin

Lunch

1:30PM – 2:00PM
Alsace

Grow Your Business with True Alternatives
Peter Nakada, Chief Education Officer, Stone Ridge Asset Management

2:00PM – 2:45PM
Alsace

Game On: Private Market Opportunities in Sports
Sal Galatioto, President, Galatioto Sports Partners (“GSP”)



Thursday, April 24
Wynn Las Vegas

2:45PM – 3:15PM
Alsace

Partner Firm Spotlights
SteelPeak: Putting it into Practice: Access Emerging Opportunities in Sports –
Reza Zamani, CEO, SteelPeak
Meet Emigrant’s Newest Partner Firms: Principle Wealth Partners & Novare
Capital Management

3:15PM – 3:45PM
Alsace

Refreshments & Networking Break

3:45PM – 4:15PM
Alsace

Fireside Chat
Howard P. Milstein, Executive Chairman & CEO, Emigrant Bank
Michael Milstein, co-CEO, Emigrant Bank
Jenny Souza, CEO & President, Emigrant Partners

4:15PM – 5:00PM
Alsace

The Family Office of the Future: Strategies & Services for the “Ultra” UHNW
Community
Liz Nesvold, Chair of Emigrant Partners & Vice Chair of Emigrant Bank

5:00PM – 6:00PM

Break

6:00PM – 7:00PM
Chambertin

Cocktails

7:00PM
Chambertin

Dinner

Friday, April 25
Wynn Las Vegas

11:00AM – 4:00PM
Partners Lounge

8AM Golf Invitational VIP Experience