Campden Wealth
Membership | Events | Research | Education | IPI

Institute for Private Investors

2026

MEMBER OVERVIEW

WELCOME FROM THE CEO

Welcome from all of us at Campden Wealth and the Institute for Private Investors.

For over 30 years, we've had the privilege of working with multigenerational families, their senior leaders, and the enterprises they guide—offering a space for connection, learning, and trusted exchange. Our global community brings together families, family offices, and private investors who are navigating the complexities of wealth and legacy with care and intention.

Through private forums, in-person gatherings, pioneering research, and our peer network, members often find not just insights—but lifelong friendships and meaningful relationships that support them for years to come.

We hope you'll consider joining this network. Whether you're seeking thought leadership, connection with like-minded families, or a space for open and private discussion, we'd be honored to support you on that path.

Thank you for your interest. We'd be grateful for the opportunity to earn your trust and play a small part in your family's journey.

Warm regards,

Susan

Susan Kemp
CEO
Campden Wealth Americas &
The Institute for Private Investors

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WHO WE ARE
MEMBERSHIP MISSION

For over 30 years, the Institute for Private Investors (IPI) has been the trusted community for ultra-high-net-worth individuals and families with $30M+ in liquid assets. Members include families, family office executives, and multigenerational wealth holders.

At the heart of IPI and Campden Wealth is a global community built on shared values and active participation—where families and their single family offices connect peer-to-peer, engage in candid conversations, and learn together. Many join for the events but stay for the year-round thought leadership, education, and enduring sense of belonging.

IPI offers personalized connections, exclusive forums, benchmarking, Masterclasses, co-investment workshops, and initiatives for Next Gen and Women in Wealth. Members also gain access to research, best practices, and global peer networks across 43+ countries through Campden and its affiliates in India, Europe, and Asia.

IPI and Campden Wealth are fully independent and do not offer asset management or advisory services.

> *"IPI has changed the game for private wealth holders by allowing them to freely and safely congregate and discuss the issues they are facing. The goal is always wisdom when it comes to managing significant wealth, and scores of families have found it at IPI sessions."*
>
> **– IPI MEMBER SINCE 1992**

CODE OF CONDUCT

IPI and Campden Wealth are trusted, peer-to-peer communities for ultra-high-net-worth families. To maintain our private, non-commercial, safe harbor environment, all members agree to the following:

- No solicitation is allowed except at designated opt-in events (e.g., Co-Investment Workshops, Needs & Leads sessions).
- Members may not pitch investments, advisory services, or business opportunities at any time outside of those sessions.
- Respect the non-commercial nature of all Forums and gatherings—even informal pitches are not permitted.
- Exchanging business cards and maintaining professional courtesy is always welcome.
- Concerns about inappropriate behavior should be reported confidentially to IPI leadership.

Memberlink® GUIDELINES

- Use discretion when discussing advisors or members—constructive, respectful dialogue only.
- Do not print or forward Memberlink® content outside your immediate family or family office.

By participating, members commit to upholding these standards to protect the integrity of our community.

CONTINUING PROFESSIONAL EDUCATION (CPE) CREDITS

We are pleased to offer Continuing Professional Education (CPE) credits. On average, members earn between 11-15 CPE credits at our Institute for Private Investors (IPI) and Campden Forum forums, with opportunities to earn up to 44 credits at the IPI-Wharton Private Wealth Management Program.

The Institute for Private Investors, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. Please note that state boards of accountancy have the final authority on the acceptance of individual courses for CPE credit.

MEMBERSHIP AND COMMUNITY

WHO IS ELIGIBLE?

We are a private, invitation-only community designed exclusively for members of ultra-affluent families, ultra-high-net-worth (UHNW) private investors, and senior executives of their single family office with a minimum of $30 million USD in investable assets.

WHAT IS INCLUDED IN AN IPI MEMBERSHIP?

An IPI membership offers exclusive access to a trusted global network of ultra-high-net-worth individuals, families and the senior executives.

Unlike many other family office networks, IPI operates on a single, transparent annual fee. There are no hidden costs—members receive full access to all events, research, and resources as part of their membership.

KEY BENEFITS INCLUDE:

- Access to all IPI and Campden Wealth events, virtual and in-person, at no additional cost
- All proprietary research and benchmarking reports
- A dedicated relationship manager and member services team
- 24/7 access to the secure member portal, including white papers, directories, and the Memberlink® forum
- A curated library of peer and expert content on family office and wealth topics
- Participation in Co-Investment Workshops and Needs & Leads sessions
- Monthly events for families and executive teams across generations and regions

WHY DO PEOPLE JOIN?

We asked our members why they chose to join IPI—and the answers reflect the value of a community built by families, for families. For many, IPI offers something they couldn't find elsewhere: a truly private space to learn, connect, and grow alongside peers facing similar opportunities and challenges.

HERE'S WHAT THEY TOLD US:

- Frustration with traditional events dominated by vendors or service providers
- Support for the rising generation's involvement in the family enterprise
- Navigating a recent or upcoming liquidity event
- Desire to expand their network and connect with families of similar scale and experience
- Access to deal flow and trusted co-investment partners
- Educational opportunities for family members and key executives
- Building trusted relationships—both professional and personal
- A place to satisfy deep intellectual curiosity in a peer-driven environment

"It was wonderful. Thanks so much for including me. It's truly the first time I have felt like I belonged somewhere and I didn't have anything to hide. That was really special."

– IPI MEMBER SINCE 2020

MEMBERSHIP AND COMMUNITY

COMPOSITION

1400
GLOBAL FAMILY MEMBERS

537 PRINCIPALS	389 FAMILY MEMBERS	237 NEXT GENERATION	292 FAMILY OFFICE EXECUTIVES

5
CONTINENTS

43
COUNTRIES

COUNTRIES REPRESENTED BY THE MEMBERSHIP

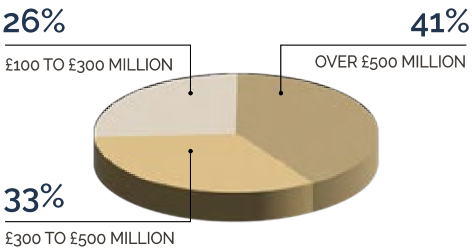
ARGENTINA	HONG KONG	NETHERLANDS
AUSTRALIA	INDIA	NIGERIA
BELGIUM	INDONESIA	SAUDI ARABIA
BRAZIL	IRELAND	SINGAPORE
CANADA	ISRAEL	SWITZERLAND
CHINA	ITALY	SPAIN
FINLAND	KUWAIT	THAILAND
FRANCE	LEBANON	UNITED ARAB EMIRATES
GERMANY	MONACO	UNITED KINGDOM
GUATEMALA	MEXICO	UNITED STATES

AVERAGE TENURE OF MEMBERSHIP **9.5 YEARS**

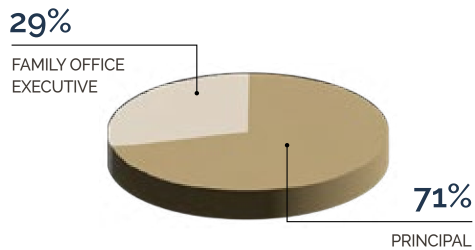
MEMBERSHIP AND COMMUNITY

MEMBERSHIP PROFILE

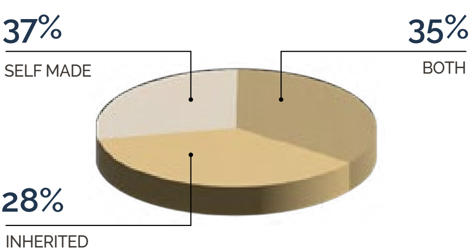
TOTAL ASSETS OF FAMILY



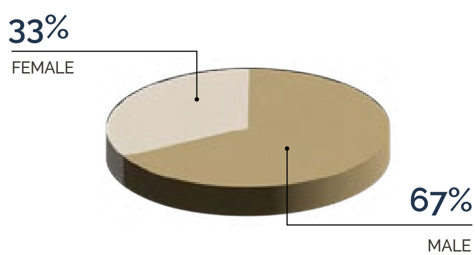
FAMILY MEMBER ROLE



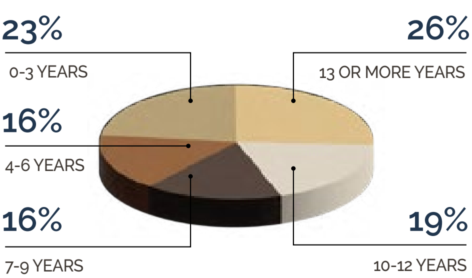
ORIGIN OF WEALTH



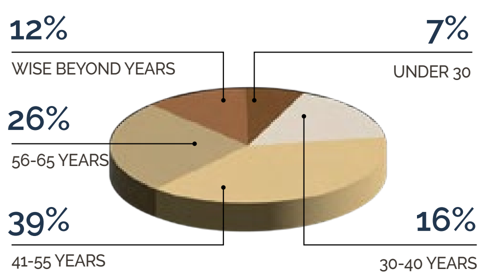
GENDER



TENURE



MEMBER AGE



MEMBERSHIP TYPES

	INDIVIDUAL MEMBERSHIP	FAMILY MEMBERSHIP
I plan on attending events by myself	✓	
I have next gen family and/or executives in my organization who would participate		✓
I enjoy international travel	✓	✓
I have business ventures overseas	✓	✓
Only one person may participate, must be the same person each time	✓	
Family members, senior executives, can also participate		✓
Access to all events around the world	✓	✓
12 Month Cost	$13,500	$15,500
24 Month Cost	$20,250	$23,250

I can't tell you enough how much I enjoy the IPI organization and all you guys do. There are other family office and investor organizations that we pay membership fees to that I have to scrutinize each year as to their value. IPI isn't one of them.

– IPI MEMBER SINCE 2017

MEMBERSHIP PATHWAY

SCAN TO APPLY

INTERVIEW
Meet with a member of the membership team to help us better get to know you and help answer all your questions.

APPLICATION
Complete our 3-minute application form at
https://memberlink.net/join

DECISION & NEXT STEPS:
If approved, you will be informed by someone on our membership team. After filling out a questionnaire, we will on-board your group with a formal call to introduce you to our events, online platforms, and membership perks. Plus, you'll have the opportunity to share current needs and challenges, so we can begin making member introductions and provide IPI-exclusive resources and solutions.

GETTING STARTED:
- Meet your dedicated membership liason
- Register for any and all events that pique your interest
- Engage in conversations and regular outreach with our high-touch membership team
- Connect with members in-person and virtually

In addition to gratitude, one of other strongest contributors leading to happiness is a sense of belonging to a community. I have to say that [IPI has] created an extraordinary community within IPI and I benefit from it by a large multiple of what I bring to it. Thanks for all you do.	**– IPI MEMBER SINCE 2015**

COMMUNITY NETWORKS & PROGRAMS

All communities and program participants abide by IPI's Code of Conduct and non-solicitation policies

IVORY SNOW

Ivory Snow gatherings are reserved exclusively for private investor members with no professional affiliations, product offerings, or service interests – ensuring a truly peer-only environment. These confidential gatherings are designed for participants who have nothing to gain beyond meaningful connection, shared learning, and mutual support. Free from external agendas or commercial influence, Ivory Snow fosters open, candid dialogue among individuals who understand the unique responsibilities and complexities that come with significant family wealth.

NEXT GEN AND RISING GEN

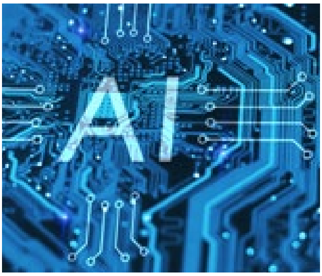
Our NextGen and Rising Gen opportunities are designed to educate, empower, and connect emerging family leaders – from those in their 20s and 30s beginning to engage, to those in their 40s and 50s taking on leadership roles within their families and enterprises. Through dynamic workshops, interactive sessions, and social meet-ups, participants build trusted peer networks and explore the complexities of transitions, succession, and life within a family of significant wealth. Whether just starting out or actively stepping in, members benefit from a supportive environment and access to an evolving library of on-demand resources, featuring past sessions and expert insights on topics such as family dynamics, career development, leadership, and personal planning.

HEALTH & WELLNESS

As part of our commitment to supporting the holistic well-being of our members, the Institute for Private Investors (IPI) has partnered with Mayo Clinic to present a quarterly virtual speaker series focused on wellness, performance, and longevity. Led by distinguished experts, these sessions explore a broad range of critical topics – including preventive health, lifestyle optimization, nutrition, physical fitness, and resilience – offering actionable strategies to help members sustain vitality and enhance long-term quality of life. Each program includes interactive Q&A and concludes with peer-to-peer breakout discussions, creating space for members to share experiences and perspectives in a private, trusted environment.

COMMUNITY NETWORKS & PROGRAMS

All communities and program participants abide by IPI's Code of Conduct and non-solicitation policies



AI COUNCIL

A dynamic community for those shaping, building, or simply curious about the future of artificial intelligence. The AI Council brings together forward-thinking members through virtual sessions and exclusive in-person gatherings. Featuring expert speakers and interactive discussions, the Council explores AI's rapidly evolving landscape—from practical applications and ethical considerations to long-term impact and opportunity. It's a space for insight, collaboration, and staying ahead of the curve.

BILLION DOLLAR CLUB

A private network for substantial families seeking connection and trusted peer exchange. Designed for those managing large-scale wealth, with a net worth exceeding a billion dollars, and complex family enterprises, the network brings members together – virtually and in-person – for meaningful conversations around investment strategy, governance, succession, philanthropy, and legacy. With discretion at its core, the network fosters deep relationships among families navigating similar complexities, offering unparalleled opportunities to learn from peers who share similar levels of influence, responsibility, and vision.

WOMEN OF WEALTH

An exclusive, invitation-only network of women wealth holders who convene monthly—virtually and occasionally in person— for deeply candid, peer-led conversations. Held under strict confidentiality, these sessions create a rare space for trust, openness, and real connection. Members explore everything from family dynamics and legacy to investment strategy and personal growth—what's shared here stays here.

FAMILY OFFICE IMPACT NETWORK (FOINET)

Our Family Office Impact Network (FOINET) is a highly curated, invitation-only community of family office peers committed to philanthropy and impact investing. Built for families already actively engaged in driving social impact, FOINET offers a confidential environment where members connect through select virtual and in-person gatherings to share insights, collaborate, and scale impact together – including those engaging next-generation leaders. The network is all-volunteer, with no participation fees or for-profit deal flow beyond social impact, fostering a trusted community grounded in shared values and a commitment to systemic change.

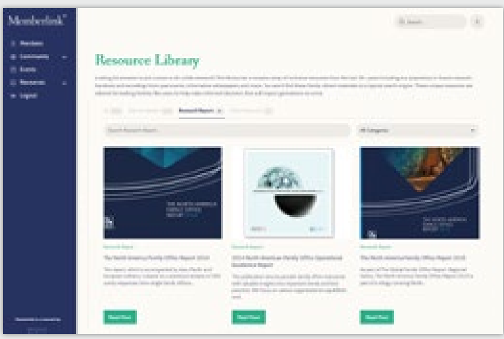
MEMBERLINK - STAY CONNECTED

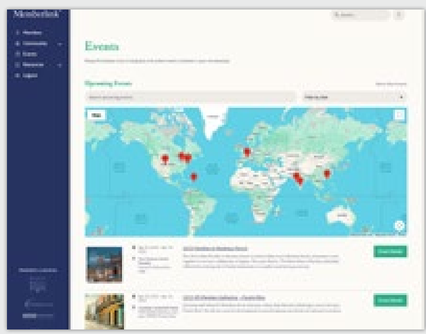
The Members Global Digital Platform

In our ever-growing digital world, it's critical to connect with other families and resources across the web. We are pleased to offer a variety of resources to connect, access partners, thought-leadership and research, and more in our member-exclusive online platform, Memberlink. Some key features include:

- **Resource Library –** All presentations, whitepapers, videos,recordings
  Access to the research library and all in-house reports
  View Podcast and Webinars of Family Stories
- **Event Calendar, Handouts, and Recordings –** Register for member gatherings and find event details
  You can find today's presentations in real-time
- **Member Directory –** An opt-in directory for members for non-solicitous purposes
- **Member Bulletin Boards –** Ask a question, request help from your fellow members

Simple Navigation



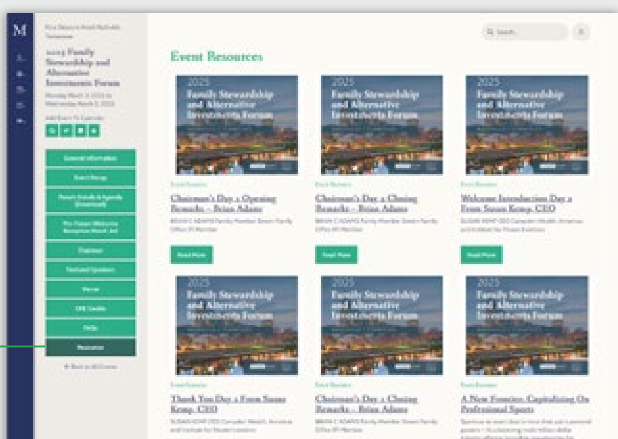


Access to Event Resources

Go to the "Events" page

↓

View today's presentations in real-time.

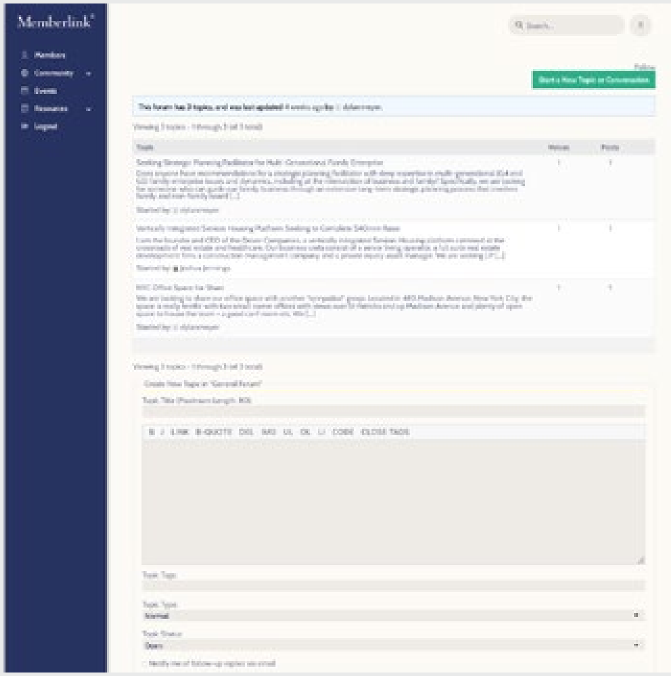


MEMBERLINK - STAY CONNECTED

The Members Global Digital Platform

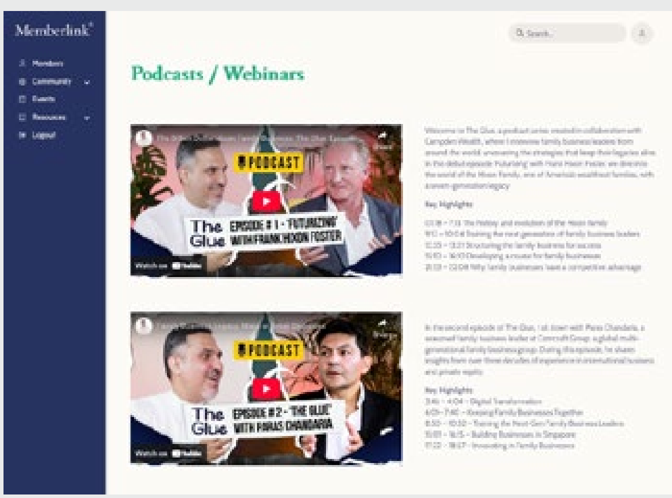
Member Bulletin Boards

This is a private space to ask questions, share insights, and engage with peers on a wide range of topics. Members can like, reply, start conversations, and follow specific threads to receive updates as the dialogue evolves. It's a powerful tool for staying connected, informed, and supported by a trusted community of fellow members.

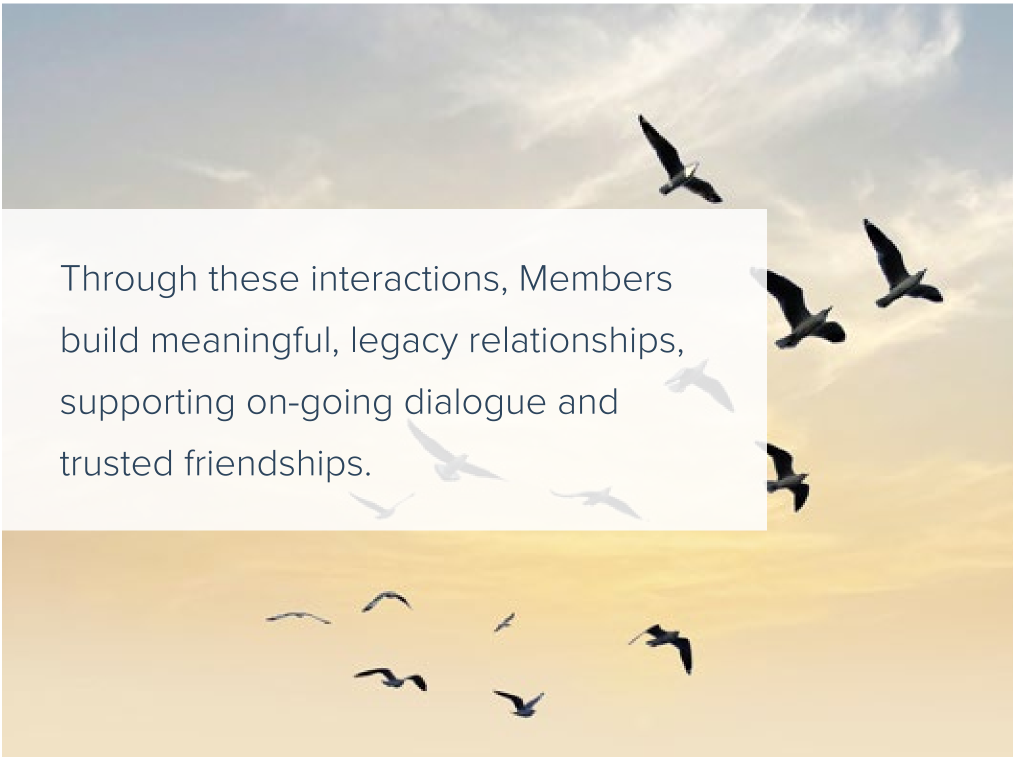


Podcasts / Webinars

Our growing library of podcasts and webinars offers members on-demand access to thought leadership, peer insights, and expert perspectives across the family office and investment landscape. We're excited to launch The Glue – a brand-new podcast where we sits down with influential family business leaders from around the world to explore the values, challenges, and strategies that hold families and enterprises together across generations.



MEMBER CONNECT®



BESPOKE INTRODUCTIONS & CONNECTIONS AROUND ALIGNED OBJECTIVES

Campden is a global community of families committed to knowledge exchange, peer support and business opportunities. And history tells us families learn best, from other families.

Club Members gain access to a carefully curated network of peers and the unique service of personalized introductions around their aligned objectives, designed to provide you with solutions, shared knowledge and opinions for consideration.

Upon joining, a tailored profile is created to align you with like-minded individuals who share your interests, goals, and vision. This bespoke service not only extends your reach but also connects you to a world of opportunities for you and your family enterprise.

All introductions are thoughtfully managed (either in-person or virtually), moderated and made exclusively upon request, ensuring that each connection is purposeful and relevant. Whether you are exploring co-investment prospects in new markets or seeking advice around a private family matter, you will have the opportunity to engage with other Members who will share their own experiences, knowledge and solutions.

Through these interactions, Members build meaningful, legacy relationships, supporting on-going dialogue and trusted friendships.

DEAL FLOW

IPI FAMILY CO-INVESTMENT & DIRECT DEAL-FLOW WORKSHOPS

A private platform for members to share and explore family-led investment opportunities.

The Family Co-Investment & Direct Deal-Flow Workshops are exclusive, interactive sessions designed to foster collaboration among IPI members through shared deal flow and real-world experience.
Each workshop consists of three parts:

1. **Investor Spotlight:** A case study presented by an experienced direct investor, sharing insights, strategies, and lessons from their journey.
2. **Open Discussion:** A member-led forum where families explore pressing issues related to direct investing and co-investment, from sourcing and due diligence to governance and exit planning.
3. **Member Deal Flow:** Four to five curated direct investment opportunities presented by IPI members. Each opportunity must be a current active equity deal (no funds) and a company in which an IPI member is directly invested or actively involved.

Disclaimer: All investment opportunities are presented by IPI members for informational purposes only. Members are solely responsible for conducting their own due diligence. Campden IPI does not endorse, evaluate, or assume liability for any investment presented or discussed.

IPI NEEDS & LEADS

IPI is here to support you, your family, or office with any challenge—personal or professional, big or small. One of our greatest strengths is the power of meaningful member connections. Needs & Leads sessions—held virtually and at forums—offer a confidential space to share a specific “Need” and receive targeted “Leads” from peers. Present your ask, engage in clarifying discussion, and follow up directly with those who can help.

EXAMPLES OF PAST NEEDS:

- Meeting landowners in the West
- Strategic advice on philanthropy or impact investing
- Expert input on governance or succession
- Compensation consultants for family businesses
- DeFi deal flow with strong governance
- Luxury travel agency recommendations
- Hiring a 2–4 year associate with private banking experience

I would not be able to do what was entrusted to me by my dad without the education, interaction and fun provided by IPI.

– IPI MEMBER SINCE 2002

ONLINE EDUCATION

Campden Education

We designed this education platform to be flexible, self-paced way to dive into the core topics that matter most to enterprising families. Whether someone can't make it to an in-person event, wants to explore a topic more deeply, or is just getting started on their learning journey — this is a great way to supplement what we offer in person.

HERE'S HOW IT WORKS:

- Every membership includes **one complimentary course module slot of your choosing, and you choose who uses it** - you, your family, or anyone in your office team
- Additional participants or courses can be added for a small *fee.
- Course modules run over a few weeks, with a clear start and finish date, but you can move through the material at your own pace — whenever it fits into your life.
- Each module includes short videos, a real family case study, and wraps up with a live virtual session led by a peer thought leader.

Module 1: BECOMING RESPONSIBLE STEWARDS OF FAMILY WEALTH
This 4-week introductory module will guide you in defining your aspirations as wealth stewards.

Module 2: FAMILY GOVERNANCE
In this 5-week module, you will learn about the essentials of family governance and gain practical insights into designing and implementing family governance structures.

Module 3: FAMILY COMMUNICATION AND CONFLICT MANAGEMENT
In this 5-week module, you will learn about the unique dynamics of a family business and gain practical insights into how to prevent and manage conflicts effectively.

Module 4: FAMILY BUSINESS LEADERSHIP
In this 6-week module, you will learn about the different roles and responsibilities in family business leadership and gain practical insights into effective family business leadership.

Module 5: FAMILY OFFICE
In this 5-week module, you will learn to define how a family office serves your family needs and gain practical insights into establishing and structuring a family office.

Module 6: SUCCESSION PLANNING
In this 5-week module, you will learn to identify the critical aspects in succession planning and best practices in developing next-gen successors.

*Fee structure after your complientary module:

Module 1 ($1,295)	**Module 4 ($1,575)**
Module 2 ($1,575)	**Module 5 ($1,750)**
Module 3 ($1,575)	**Module 6 ($1,750)**

Contact: SusanKemp@campdenwealth.com

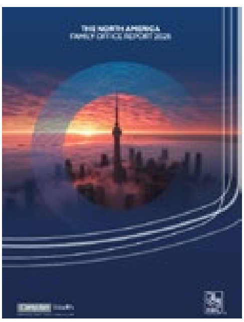
RESEARCH

Campden Wealth has cultivated an unmatched understanding of what matters most to ultra-high-net-worth families and the executives who lead their family offices. Our insights span the priorities, challenges, and strategies that define multi-generational family businesses and the drivers behind their long-term success.

Through a blend of proprietary quantitative surveys and in-depth qualitative discussions, we produce data-rich research and forward-looking analysis on the trends shaping today's global wealth landscape.

Members not only benefit from the thought leadership these reports provide, they also have the opportunity to participate in the project, gaining the ability to benchmark directly against their peers.

HIGHLIGHTED RESEARCH REPORTS



ANNUAL GLOBAL FAMILY OFFICE REPORT (REGIONAL SERIES)
The world's leading and most comprehensive study on family offices, this report explores investment strategies, performance, operating costs, governance, and succession planning. The latest edition features deep dives into key regions: Asia-Pacific, Europe, and North America.

THE FAMILY OFFICE OPERATIONAL EXCELLENCE REPORT
Explores how family office's structure teams, manage outsourcing, adopt technology, and implement governance. Based on North American family offices, the report benchmarks practices across small, midsize, and large AUM tiers — revealing key differences in cost efficiency, tech adoption, and family satisfaction.

OTHER TOPICS INCLUDE:
- The North America Family Business Report
- The Ultra-High Net Worth Private Equity Investing Report
- Family Offices Investing in Venture Capital
- The Next Generation of Wealth Holders in the U.S.
- Global Trends & Strategic Time Horizons in Family Philanthropy

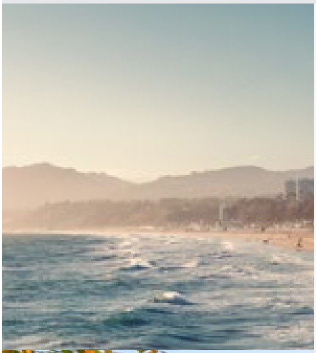
Campden Wealth

Membership | Events | Research | Education

Institute for Private Investors

FORUM CALENDAR

EVENTS - NORTH AMERICA



WINTER INVESTMENT AND FAMILY OFFICE FORUM

FEBRUARY 25-26, 2026 | SANTA MONICA, CA

The IPI Winter Investment and Family Office Forum will be held oceanside at the luxurious Regent Santa Monica Beach hotel. This year's agenda highlights emerging investment opportunities in high-growth sectors such as venture, entertainment, health and wellness innovations, and deep tech. Participants will gain a firm grasp on the global economic outlook for the coming year along with best practices in family office set-up, governance, and intergenerational wealth transfer—ensuring families are not only preserving wealth but positioning it for long-term growth amid accelerating change.

FAMILY INVESTMENT AND MACRO FORUM

MARCH 25-26, 2026 | WASHINGTON DC

The 2026 Family Investment and Macro Forum convenes family offices and ultra-high-net-worth investors in our nation's capital for a forward-looking examination of the forces shaping capital allocation and wealth preservation in the year ahead. Through family- and expert-led discussions on global markets, artificial intelligence, public policy, geopolitics, and defense – alongside distinctive Washington insider perspectives – the forum delivers clarity amid uncertainty. Attendees will gain actionable takeaways on portfolio positioning, risk management, and long-term strategy, helping them understand how macro trends translate into real investment implications, where opportunities may emerge, and how policy and geopolitical shifts could impact private capital and multi-generational wealth.

FAMILY ALTERNATIVE INVESTMENT FORUM

MAY 13-14, 2026 | SAN FRANCISCO, CA

The Family and Alternative Investment Forum focuses on wealth preservation and creation, including wealth management strategies and family stewardship. Participants will have the opportunity to explore and assess the most effective investment strategies for their family office—whether through direct investments, co-investing, fund investments, or advisory services. In addition, the forum will provide valuable insights into a wide range of alternative investments, including venture capital, private equity, and sector-specific opportunities.

MID-YEAR INVESTMENT AND FAMILY FORUM

JUNE 10-11, 2026 | NEW YORK, NY

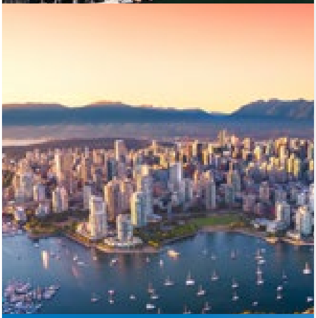
IPI's Mid-Year Forum brings together the full force of the IPI community to address investment needs, capture market opportunities, and reconnect with fellow members. Across keynotes, panels, and thematic group discussions, participants will connect with industry experts and luminaries at the forefront of change. From an overview of the economy to the latest in AI, this forum provides insight on how to stay competitive, adapt to market shifts, and make informed decisions that can drive financial success and growth.

EVENTS - NORTH AMERICA

FAMILY DYNAMICS, ENTERPRISE & OFFICE FORUM

SEPTEMBER 15-16, 2026 | VANCOUVER, CAN

The Family Dynamics and Office Forum centers on strengthening family governance and professionalizing family offices including essential strategies for generational transitions and long-term success. Leaders of family offices and businesses share insights on succession planning, tax-efficient estate planning, and fostering stewardship skills in the next generation. Key topics include the evolving structures of family offices, the effective management of foundations, and the unique challenges faced by the next generation of family leaders. The forum will provide actionable insights aimed at fostering family cohesion and driving sustainable growth.



FALL INVESTMENT FORUM

SEPTEMBER 17-18, 2026 | VANCOUVER, CAN

The IPI Fall Investment and Real Estate Forum addresses multi-asset investing with a family-focused approach to maximize outcomes. Attendees will explore emerging opportunities with a focus on real estate while evaluating the impact of economic uncertainty on their portfolios. Building on the previous day's Dynamics and Office Forum, the program addresses critical questions around finding alpha and includes a Co/Direct Invest Workshop, helping members source and evaluate potential deals.

21ST ANNUAL FAMILY OFFICE FORUM

NOVEMBER 18-19, 2026 | WEST PALM BEACH, FL

The Family Office Forum explores all facets of family office management, including operations, governance, succession planning, investment structuring, and tax considerations. Attendees will discuss best practices for recruiting and retaining staff, determining which functions to handle in-house versus outsourcing, and navigating transitions. This forum offers a unique space to learn, exchange ideas, and form connections that will support family offices across generations. We'll address common challenges and proactive solutions to thrive into 2027 and beyond.

END OF YEAR FORUM

DECEMBER 08-09, 2026 | AUSTIN TX

IPI's End of Year Forum provides a year-end review of investment performance and strategies. Industry experts offer insights and peer benchmarking opportunities to assess asset allocations. Topics include the 2027 macroeconomic outlook and strategies for structuring and rebalancing portfolios. Key themes encompass sectors such as real estate, energy, agriculture, and beyond, providing attendees with the insights and strategies needed to approach the upcoming year with a focused and informed perspective.

EVENTS - EUROPE

FAMILY ALTERNATIVE INVESTMENT FORUM
FEBRUARY 25-26, 2026 | LONDON, UK

FAMILY OFFICE & INVESTMENT FORUM
JUNE 2-3, 2026 | GENEVA, SWITZERLAND

FAMILY ENTERPRISE AND INNOVATION FORUM
SEPTEMBER 16-17, 2026 | MILAN, ITALY

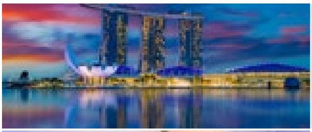
FAMILY OFFICE FORUM: LONDON, UK
DECEMBER 01-02, 2026 | LONDON, UK

EVENTS - GLOBAL

GLOBAL OWNERS & FAMILY OFFICE CONGRESS
OCTOBER 20-22, 2026 | ABU DHABI, UAE

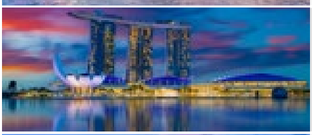
Campden Global Family Office Congress brings together over 300 members, families and their private offices from around the world to share knowledge and discuss best practices. The focus is on families talking to families through immersive networking, content and education. Prominent local families open their doors. The agenda features four themed tracks cover a gamut of issues facing families along with a look at the current investment and geopolitical landscape. Complimented by an array of social gatherings and events.

EVENTS - ASIA



FAMILY ENTERPRISE AND WEALTH CREATION FORUM
MARCH 10-11, 2026 | SINGAPORE

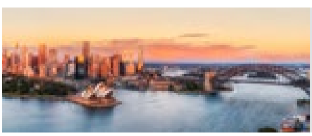
FAMILY OFFICE & INVESTMENT FORUM
JUNE 25-26, 2026 | HONG KONG, PRC



FAMILY OFFICE, IMPACT AND INNOVATION FORUM
SEPTEMBER 9-10, 2026 | SINGAPORE

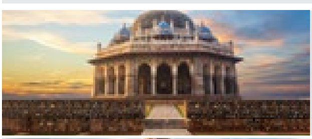
FAMILY ENTERPRISE AND ALTERNATIVE INVESTMENT FORUM
NOVEMBER 24-25, 2026 | HONG KONG, PRC

EVENTS - AUSTRALIA



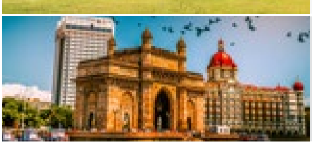
FAMILY ENTERPRISE AND FAMILY OFFICE FORUM
NOVEMBER 9-10, 2026 | SYDNEY, AUSTRALIA

EVENTS - INDIA



FAMILIES IN BUSINESS FORUM
APRIL 28-29, 2026 | DELHI, INDIA

FAMILY ALTERNATIVE INVESTMENT FORUM
AUGUST 20-21, 2026 | MUMBAI, INDIA

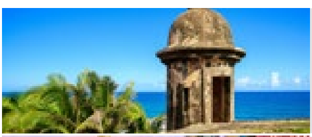


FAMILY OFFICE FORUM
DECEMBER 8-9, 2026 | MUMBAI, INDIA

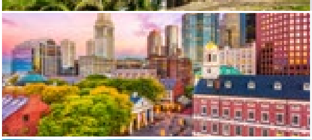
IPI MEMBER GATHERINGS

Member gatherings are intimate, themed events designed to foster deeper connections and more meaningful conversations among members. These smaller-scale networking experiences are often centered around a shared interest, location, or timely topic, and are thoughtfully paired with a curated experiential element—such as a private tour, hands-on workshop, or exclusive dinner—to elevate the sense of engagement and community. By focusing on quality over quantity, these gatherings create space for trust-building, collaboration, and lasting relationships.

2025 member gatherings included:



APRIL 23-25, 2025 | SAN JUAN, PUERTO RICO



SEPTEMBER 24, 2025 | BOSTON, MASSACHUSETTS

OCTOBER 6, 2025 | AUSTIN, TEXAS

2026

Memeber Gatherings

Dates and Locations to be Announced

For more information please contact

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2026 Institute for Private Investors and Campden Wealth Events

Month	Dates	Event
FEBRUARY	24-25	Family Alternative Investment Forum: ***London, UK***
	25-26	Winter Investment and Family Office Forum: ***Santa Monica, CA***
MARCH	10-11	Family Enterprise and Wealth Creation Forum: ***Singapore***
	25-26	Family Investment and Macro Forum: ***Washington DC***
APRIL	28-29	Families in Business Forum: ***New Delhi, India***
MAY	03-08	IPI-Wharton Private Wealth Management Program: ***Philadelphia, PA***
	13-14	Family Alternative Investment Forum: ***San Francisco, CA***
JUNE	02-03	Family Office and Investment Forum: ***Geneva, Switzerland***
	10-11	Mid-Year Investment and Family Forum: ***New York, NY***
	25-26	Family Office and Investment Forum: ***Hong Kong, PRC***
AUGUST	20-21	Family Alternative Investment Forum: ***Mumbai, India***
SEPTEMBER	09-10	Family Office, Impact and Innovation Forum: ***Singapore***
	15-16	Family Dynamics and Office Forum: ***Vancouver, Canada***
	16-17	Family Enterprise and Innovation Forum: ***Milan, Italy***
	17-18	Fall Investment Forum: ***Vancouver, Canada***
OCTOBER	20-22	Global Owners and Family Office Congress: ***Abu Dhabi***
NOVEMBER	09-10	Family Enterprise and Family Office Forum: ***Sydney, Australia***
	18-19	Family Office Forum: ***West Palm Beach, FL***
	24-25	Family Enterprise and Alternative Investment Forum: ***Hong Kong, PRC***
DECEMBER	01-02	Family Office Forum: ***London, UK***
	08-09	Family Office Forum: ***Mumbai, India***
	08-09	End of Year Forum: ***Austin, TX***

Institute for Private Investors | Campden Wealth — Membership | Events | Research | Education | IPI
Campden Club | Campden Family Connect — Membership | Events | Research | Education

North America | Australia | Europe Middle East | India | Asia Pacific

All events are in person. On occasion dates, times and / or locations may change due to unforeseen circumstances. Prior to booking, please confirm event details with the Campden Wealth team.

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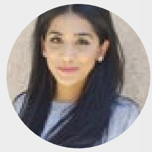

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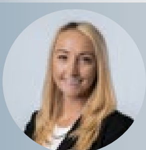

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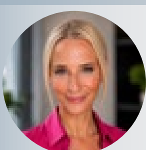

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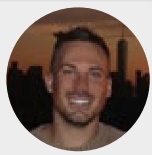

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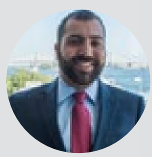

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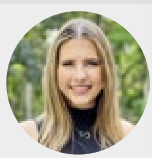

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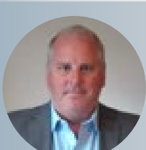

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Campden Wealth
Membership | Events | Research | Education | IPI

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