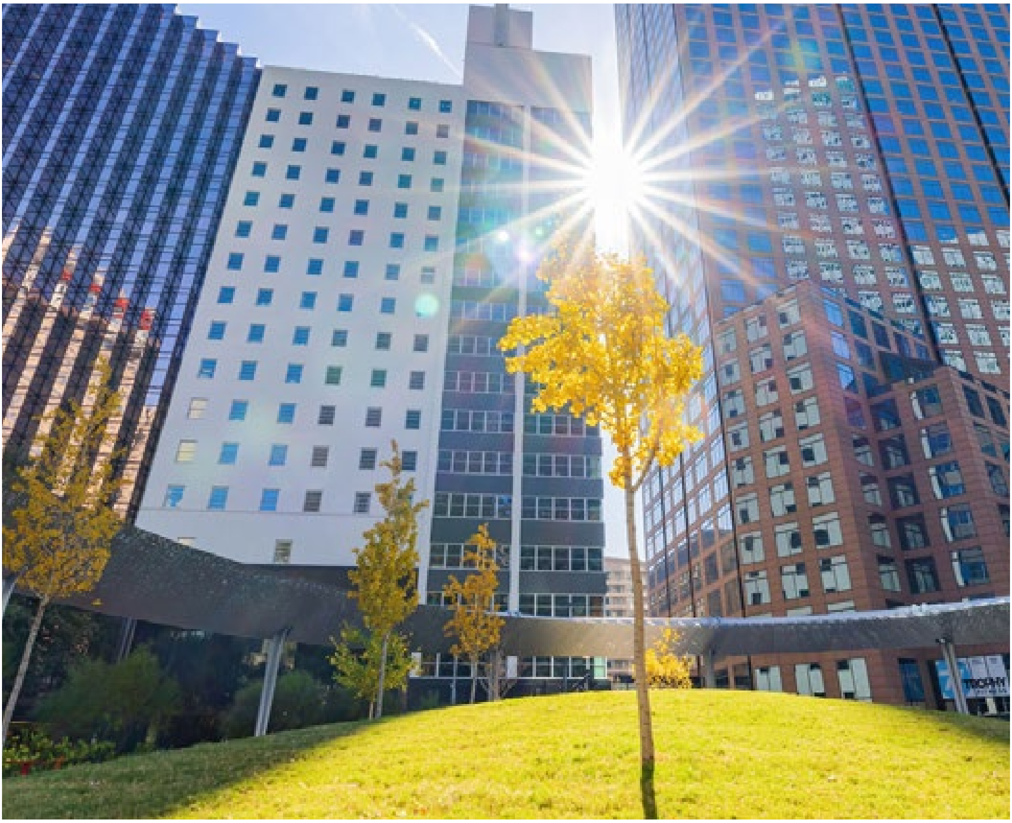
Campden Wealth
Membership | Events | Research | Education

Institute for Private Investors

2025 MEMBERSHIP OVERVIEW



MEMBERSHIP MISSION

The core of IPI is to create and cultivate everyday peer-to-peer connections between families and their single family offices, provide education to their members and entities, and engage in thought-leadership not just at events, but throughout the year. Many members join for the events but have stayed for the community.

"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

WHO ARE WE?

For over 30 years, the Institute for Private Investors (IPI) has served as the preeminent community for UHNW individuals and families. Our membership is a blend of UHNW individuals, families, and high-level family office executives. All members must meet a threshold of $100 million in liquid assets though the vast majority of members far exceeds this mark.

We facilitate personalized, moderated connectivity to peers around aligned interests, challenges and objectives. We host global and regional family wealth forums, showcase best practices and benchmarking tools, run family-to-family Co-investment Workshops with qualified member-backed deal flow, provide insights and knowledge with sector-specific Masterclasses, next-generation and Women in Wealth programs, and provide member profiling, proprietary research, reports and intelligence.

By joining you become part of our global community of ultra-high net worth family members and their family offices, from more than 43 countries. We are a community of sharers and learners, helping you make considered decisions to safeguard your family's legacy. This is a private, invitation-only network for qualified family members.

IPI is owned by Campden Wealth and your success is built on decades of connections, shared stories, and successful deals within our ultra-affluent community. IPI and its global affiliate membership arms – Campden Family Connect (CFC) in India, and The Campden Club (CC) in Europe and Asia – allow members to connect no matter the geography.

The Institute for Private Investors and Campden Wealth, are independent and do not provide asset management nor advisory services.

CODE OF CONDUCT

Every member commits to uphold and adhere to the code of conduct as follows at the Institute for Private Investors / Campden Wealth, our mission is to create a safe, peer-to-peer network to exchange ideas and form friendships.

To support that goal, the following code of conduct provides guidance to members on the rules of engagement at our forums. We encourage members to engage, ask questions, take a survey and meet each other and not solicit other members for investments or services.

We ask all members, guests and speakers to respect this non-commercial tradition and refrain from giving even informal investment presentations or making solicitations of any kind. Exchanging business cards is entirely appropriate. All members, both new and veterans, agree to preserve this safe harbor.

To that end we strongly suggest that if you do witness anyone engaging in a sales pitch or other inappropriate conversation that you bring it to our attention. You may do so anonymously by placing a note in our comment box at the registration desk so that we may make sure the member has a better understanding of the code of conduct.

We do provide opportunities where investment solicitations are permitted through our Co-Investment Workshops and in our Needs and Leads virtual and in-person sessions. Please remember that a member's opinion may be biased. IPI urges members to perform their own extensive due diligence.

Investor Conversations on Memberlink® – The freedom to ask, and reply – all within a confidential, private network – are the foundation of the safe harbor on Memberlink®. Use your judgment when criticizing an advisor or fellow member; no "flaming." Never print out and / or forward dialogues to anyone other than your own family / family office.

IPI is not responsible for the views expressed or any actions taken as a result of information shared on Memberlink®. IPI does not edit or otherwise perform due diligence on the responses.

MEMBERSHIP AND COMMUNITY

WHO CAN JOIN?

The Institute for Private Investors (IPI) is a community designed exclusively for:

- Members of ultra-affluent families and UHNW private investors
- Senior executives of significant family-owned enterprises, foundation, and family offices Only ultra-high net worth families (minimum of $100M USD net worth liquid) and executives of their family-owned businesses, family offices, and foundations, are eligible to gain access to Campden Wealth's websites and conferences, as well as the IPI membership community.

WHAT IS INCLUDED IN AN IPI MEMBERSHIP?

The Institute for Private Investors is truly a one-of-a kind network with active participation and access to some of the world's leading families. Unlike other family office groups, IPI is proud to offer all events, research, and additional resources for one flat fee and no hidden costs. Members get:

- All Campden Wealth and IPI research reports
- Dedicated relationship manager, logistics contact, and a team of member services experts to connect you with members and exclusive resources
- Access to all events, no extra cost per event
- Online membership, self-service portal with all research, white papers, member and advisor databank, member forum, and more
- Peer- and expert-curated library of resources
- Exclusive participation in and access to industry-leading in-house research
- Events nearly every month – virtual and in-person for the whole family and senior executive team

WHY DO PEOPLE JOIN?

We asked actual members why they joined IPI and compiled some of our favorites:

- Tired of going to family office events and being outnumbered with suppliers and those claiming to work in a family office
- Encourage Next Gen interests in the family enterprises
- Recently going through or recently underwent a liquidity event
- Broaden their network and meet families of a similar size or who are experiencing or have gone through current events
- Deal flow – both finding deals and co-investors
- Education for family office members and executives
- Build professional relationships and make life-long friendships
- Intellectual curiosity

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	$12,700	$15,200
24 Month Cost	$22,860	$27,360

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

PROCESS

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://www.memberlink.net/membership-application-2025

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.

If membership isn't a fit, not to worry! You may still qualify to join as a professional partner, or you might enjoy other resources like our Family Business Magazine.

GETTING STARTED:
- Complete the new member questionnaire
- 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

IN-PERSON FORUMS

- Eight in-person multi-day gatherings in the USA, led by family members and experts providing family office, family enterprise, and investment education alongside several structured networking opportunities
- An additional dozen regional events across Europe, Asia, the Middle East, and India, and one global week-long congress in Dubai

"IPI provides an unparalleled variety and quality of speakers that are informative and engaging while sharing their research and ideas. IPI events are always well organized in depth and breadth to always walk away with actionable next steps.	**– IPI MEMBER SINCE 2015**

VIRTUAL OFFERINGS

WOMEN OF WEALTH

Private roundtables of 7-10 women meet every month to discuss any topic, concern, or issue. These groups hold a strict no solicitation policy. All content and discussions stay within the group. There are no sell-side partners within the group. Members may request an invitation to join.

HEALTH & WELLNESS

The Institute for Private Investors (IPI) has established a partnership with Mayo Clinic that includes a virtual expert speaker series to help our discerning members navigate through the intricate landscape of wellness, performance, longevity and maintaining optimal health.

This quarterly initiative features distinguished experts addressing an extensive spectrum of vital subjects, encompassing health and wellness, lifestyle cultivation, diet and nutrition, physical fitness, and the fostering of resilience. Speakers provide actionable insights, equipping members with practical and sustainable lifestyle practices aimed at safeguarding their longterm health and enhancing their overall quality of life.

Each virtual session includes extensive Q&A and finishes with breakout discussions to facilitate peer-to-peer interactions regarding the topic presented.

AI COUNCIL

Monthly interactive sessions with leaders and experts in the field of artificial intelligence. Open to the IPI membership. Adheres to the IPI no solicitation policy.

Led by IPI Members

"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."

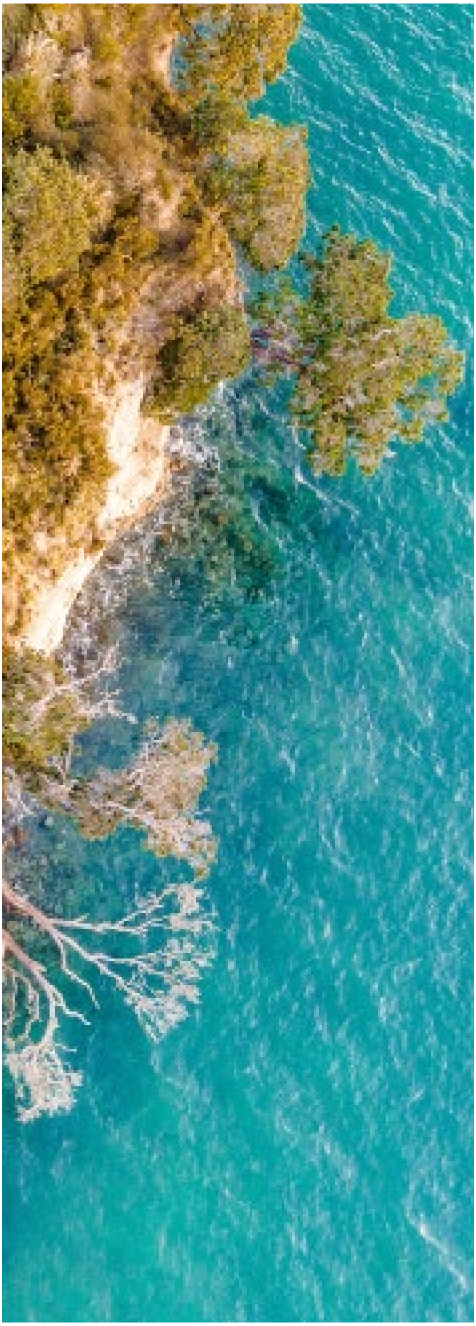
– IPI MEMBER SINCE 2020

NEXTGEN

Our NextGen programs are aimed at educating and advancing the next generation family members. These allow the NextGens to learn and share their own unique perspectives, experiences, and ideas and to build their peer network to support them while going through their journey of wealth. Sector experts and family members share their advice and experiences during interactive sessions including philanthropy, globalization, succession planning and decision making.

Join your peers for quality education and monthly connections and peruse past NextGen sessions including these:

- Health and Wellness
- Philanthropy
- Globalization
- Succession Planning and Decision-making
- Investing in China
- When and How to Have the Prenup Conversation
- Building the Right Career for your Next Generation and for your Family Enterprise
- Next Generation Leadership
- Engaging with your Family Office
- Protecting Family Wealth and Creating your own Legacy
- Reframing the Purpose of a Family Office
- Next Generation Leadership Panel



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

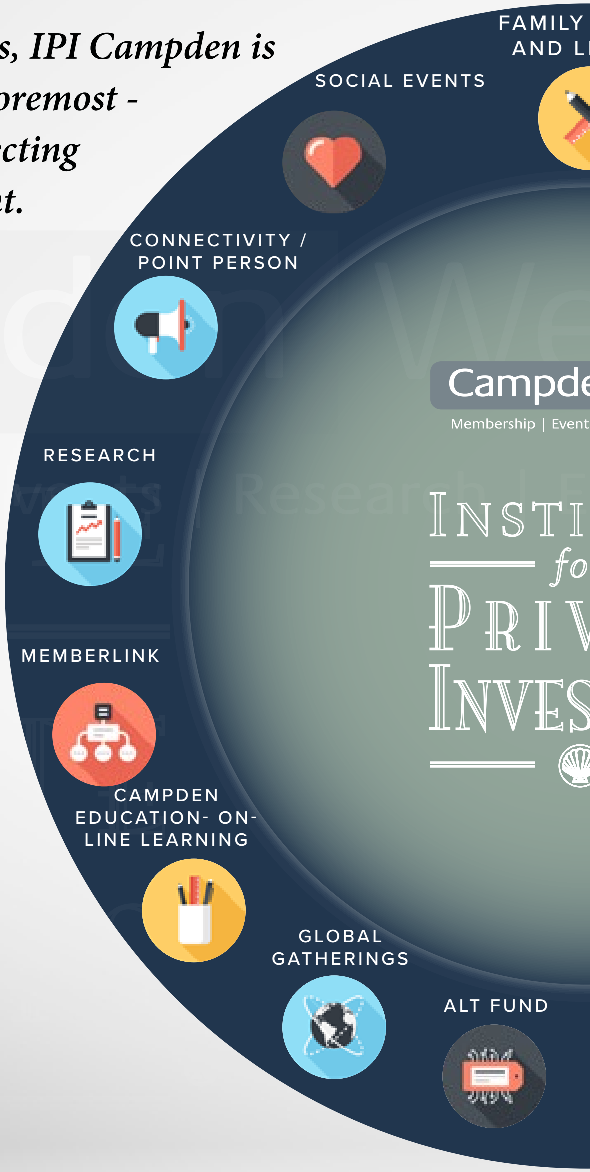
– IPI MEMBER SINCE 2002

MEMBERLINK
THE MEMBERS 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
- **Event Calendar, Handouts, and Recordings** – Register for member gatherings and find event details
- **Member Directory** – An opt-in directory for members for non-solicitous purposes
- **Research** – Access to the research library and all in-house reports
- **Private Messaging** – Direct messaging between members
- **Member Conversations** – Ask a question, request help from your fellow members

We are more than events, IPI Campden is a community first and foremost - learning, sharing, connecting in a trusted environment.



IPI FORUMS
INVESTMENT FORUMS

FAMILY OFFICE AND LEGACY
EVENTS GLOBALLY
RESEARCH

FAMILY ENTERPRISE DYNAMICS

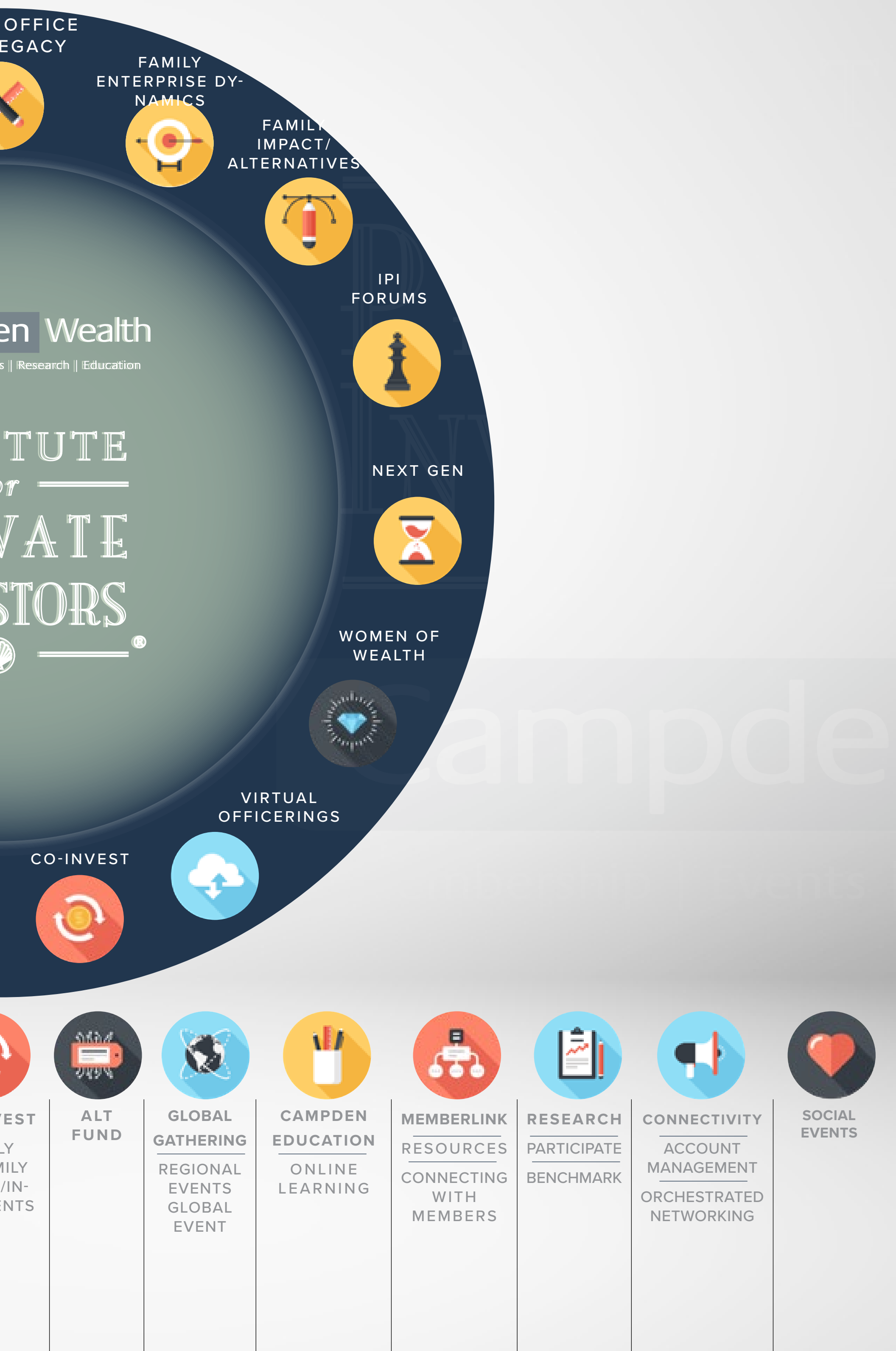
FAMILY IMPACT/ ALTERNATIVES

NEXT GEN

WOMEN OF WEALTH

VIRTUAL OFFERINGS
AI COUNCIL
MAYO CLINIC HEALTH & WELLNESS
NEEDS AND LEADS

CO-INV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MANAGEMENT
ORCHESTRATED
NETWORKING
SOCIAL
EVENTS

NEEDS AND LEADS

HELD EVERY 3 WEEKS THURSDAY AT 2PM ET AND AT ALL IN-PERSON EVENTS

The IPI community is here to help alleviate your pain points – whether through your dedicated relationship manager, Memberlink resources, or more. However, one unique session stands out to allow members to help one another in a fast-paced room, all over the course of just one hour – Needs & Leads. Every 3-4 weeks, virtually, and often in-person, members gather to share business and investment “needs” followed by clarifying Q&A, and receive “leads” from participating IPI members in return! These sessions are a great opportunity for members to share their pressing investment and business challenges and receive peer support.

Some past examples of “needs” include:

- Looking to meet landowners in the West
- Looking for strategic advice to make philanthropy/impact investments; aligns ESG interest, bringing on-board nextgen philanthropist
- Looking for academics, consultants, and university professors’ expertise in governance, development, succession, etc.
- Looking for consultants to help revamp compensation for senior execs at family business and FO
- Looking for deal flow in DeFi sector with good governance, and looking to meet FOs interested in this area
- Looking for best practices for regenerative farmers and ranchers anywhere globally
- Looking for CEOs/C-Suite execs from later-stage
- Looking for families or strategics / LPs who might be interested in participating in venture fund in life science
- Looking to hire an associate with 2-4 years’ experience, ideally with a private bank background
- Looking to upgrade accountants
- Looking for board members who have successfully monetized IP, ideally with a private equity
- Looking to hire for role in family office, who can help network (present, is charismatic, etc.) and help patriarch organize investments
- Looking for operating partner in manufacturing space
- Looking for best practices and to speak with FOs managing post-COVID work models
- 1st gen trying to set up a GST trust by end of the year

Campden Education

As a member, part of membership includes complimentary admission to module one of Campden Education, a virtual training platform empowering families with practical knowledge and tools to make informed decisions.

Module 1– COMPLEMENTARY TO MEMBERS

Becoming responsible stewards of family wealth

This 4-week introductory module will guide you in defining your aspirations as wealth stewards.

Drawing on deep expertise and real-world experiences, The Family Wealth Essentials Series is designed to guide the whole family through all stages of ownership and growth. Each module will enable you and your family to build competence and confidence in developing strategies and structures that meet your family's needs and goals. In order to enroll, you will need just your membership ID and won't need to complete a qualification form.

OTHER MODULES INCLUDE (MEMBERS GET 30% DISCOUNT)

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.

Visit https://www.campdeneducation.com

RESEARCH

Benchmark · Participate · Learn

Campden Wealth has developed an unparalleled understanding of what ultra-high-net-worth families and their family office executives value, on their thinking and priorities. We have also looked extensively at multi-generational family businesses and their key drivers for success. Our proprietary research projects combine both quantitative surveys and qualitative discussions that produce valuable data and insightful analysis on trends and developments of strategic importance to wealth holders today.

The benefit to members is not only the education and thought leadership from these reports but the ability to participate too so you can directly benchmark yourself with your peers.

SOME PAST RESEARCH REPORTS INCLUDE:

ANNUAL GLOBAL FAMILY OFFICE REPORT

The Global Family Office Reports: Regional Series is the world's leading and most comprehensive research study on family offices. It provides insight into a broad range of issues, including investments, performance, operational costs, governance, and succession planning. The most recent encompassing report consists of three subsections: *The Asia-Pacific Family Office Report, The European Family Office Report, and The North America Family Office Report.*

THE NORTH AMERICA FAMILY BUSINESS REPORT

The report provides best-in-class guidance to address succession planning, develop Next Gen leadership education, and nurture communication channels between family members. Study findings reveal technological innovations family businesses deem highly impactful to their operations, most popular financing strategies, and opportunities around integrating environmental, social, and governance (ESG) factors. The result is a rich resource for family business owners, executives, and Next Gens who want to embrace fresh thinking when building their family business legacy.

THE ULTRA- HIGH NET WORTH PRIVATE EQUITY INVESTING REPORT

Ultra-High Net Worth investors turn to private equity to enhance long-term portfolio returns. This has found that 84% of UHNW investors hold private equity investments, with a further 10% interested in the asset class. The report, which is based on the responses of 120 family offices and private individuals, found that the primary motivation for investing in private equity is enhanced long-term portfolio returns (with 67% of participants citing this as their number one motivation). This is followed by reducing portfolio volatility through diversification (for 37% of participants, the number two motivation), and obtaining exposure to emerging technologies / new industry developments (for 25%, the number three motivation).

Campden Research and reports have garnered widespread coverage by international business media outlets including The Financial Times, Wall Street Journal, Bloomberg, Reuters, The Economist, NY Times, CNBC and the BBC, as well as specialty publications – L'agefi, Corriere della Sera, The Times, South China Morning and USA Today.

THE NEXT GENERATION OF WEALTH HOLDERS IN THE UNITED STATES

The Next Generation of Wealth Holders in the United States 2022 explores the views of 100+ next generation ultra-high net worth individuals. It explores their activity and opinions across a range of topics such as succession planning, family communication and conflict resolution, their work in the family office / family business, philanthropy, and investing in burgeoning areas such as digital assets and sustainability.

The findings show that Next Gens are eager to engage in the family enterprise, have an appetite for growth and a drive to shake things up, as they aim to bring to life their vision for the future of their family legacy.

GLOBAL TRENDS AND STRATEGIC TIME HORIZONS IN FAMILY PHILANTHROPY

This report is an attempt to capture current and emerging trends in the philanthropic giving of UHNW individuals and families. In particular, it aims to explore the reasons and channels through which they engage in philanthropy, with a focus on strategic time horizons in giving.

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2025 FORUM CALENDAR

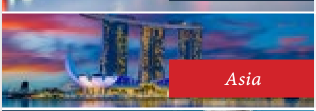
WINTER INVESTMENT AND FAMILY OFFICE FORUM
FEBRUARY 5-6, 2025 | SANTA MONICA, CA

Showcasing founders and investors driven by advances in technology across industries, the IPI's Winter Forum features leaders who have built, grown, and sold successful startups, and investors who understand the models for capitalizing on new ideas. The Winter Forum illuminates the impact of artificial intelligence on a range of sectors, including the areas of real estate, healthcare, e-commerce, entertainment, and more. In addition to a deep dive on aligning family values and stakeholder directives, this Forum encompasses investment strategies for a changing interest rate environment, including commodities, bonds, and private credit instruments, and will be held in sunny Santa Monica.

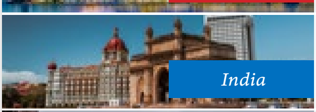
FAMILY ALTERNATIVE INVESTMENT FORUM
FEBRUARY 26-27, 2025 | LONDON, UK

FAMILY STEWARDSHIP AND ALTERNATIVE INVESTMENTS FORUM
MARCH 4-5, 2025 | NASHVILLE, TN

Centered on strengthening family governance and professionalizing family offices, the Family Dynamics, Enterprise & Office Forum covers 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 themes include evolving family office structures, managing foundations, and navigating the unique challenges raising gen leaders face, offering actionable insights to promote family cohesion and sustainable growth.



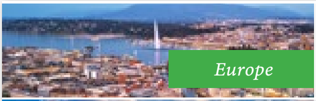
FAMILY OFFICE & INVESTMENT FORUM
MARCH 19-20, 2025 | SINGAPORE



FAMILIES IN BUSINESS FORUM
APRIL 25, 2025 | MUMBAI, INDIA

FAMILY LEGACY, IMPACT & INNOVATION FORUM
MAY 12-14, 2025 | DETROIT, MI

To help families get and stay ahead, Campden Wealth's Family Legacy, Impact and Innovation Forum spends two days discussing how we should best think of family legacy, shaping both the present and future. Family office principals and investors discuss their strategies and aims on how to honor and build upon their family's history by incorporating innovation into their family office operations and investment theses to focus on their family's values and impact for generations to come. Uncover how peers are using financial-outcome and triple-bottom-line lenses to inform their investment decisions. With a mix of thought leaders, case studies and connectivity, we undertake a community see the world in the eyes of future generations.



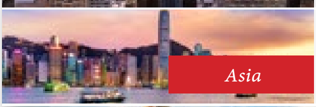
FAMILY OFFICE & INVESTMENT FORUM

JUNE 10-11, 2025 | GENEVA, SWITZERLAND

MIDYEAR FORUM

JUNE 18-19, 2025 | NEW YORK, NY

IPI's Mid-Year Forum, previously the Spring 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. This thought-provoking event will address questions around finding alpha in a late-stage economic cycle, investing opportunistically and globally amid rising tensions and headwinds, rebalancing a portfolio of public and private equities and credit, whether or not AI is a bubble – and if so, when it may burst.



FAMILY OFFICE & INVESTMENT FORUM

JUNE 24-25, 2025 | HONG KONG, PRC

FAMILY ALTERNATIVE INVESTMENT FORUM

AUGUST 21-22, 2025 | BENGALURU, INDIA

FAMILY DYNAMICS, ENTERPRISE & OFFICE FORUM

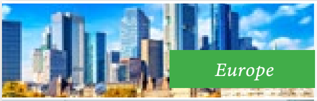
SEPTEMBER 9-10, 2025 | DENVER, CO

Focused on wealth preservation and creation, this forum addresses key themes such as wealth management strategies, the legacies of prominent local families, private trust companies, and family stewardship. Attendees will explore tax and estate planning for future generations and examine alternative investments in sectors like sports, music, entertainment, and healthcare. Best-in-class family office CIOs will share their allocation strategies and exchange insights with peers and industry experts. Join us in Nashville for an invaluable opportunity to connect with thought leaders.

FALL FORUM

SEPTEMBER 11-12, 2025 | DENVER, CO

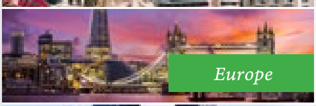
IPI's Fall Forum focuses on investing across financial markets and asset classes while integrating a family-focused office to achieve better outcomes. We take stock of our positions from a macroeconomic perspective, and uncover emerging ideas across a range of economic drivers, such as real estate, energy, aerospace, and telecom. Alongside leading experts and educational sessions, IPI will facilitate breakout discussions to take a deep dive into various sectors, and small ground discussions around maximizing all forms of capital – human, financial, intellectual, spiritual, and social. This Forum equips you with sector-specific knowledge to inform your investment decisions, and includes a Co/Direct Invest Workshop to learn about fellow IPI members' areas of expertise to help you source and diligence potential deals.



EUROPEAN FAMILY BUSINESS FORUM
SEPTEMBER 17-18, 2025 | FRANKFURT, GERMANY

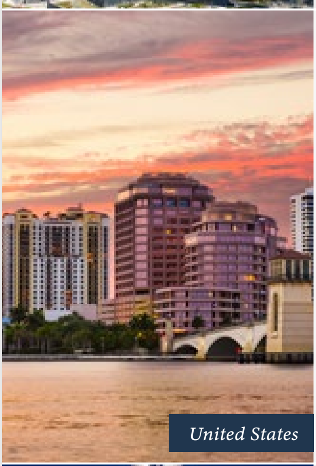
GLOBAL OWNERS & FAMILY OFFICE CONGRESS
OCTOBER 13-16, 2025 | DUBAI, UAE

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.



EUROPEAN FAMILY OFFICE FORUM
NOVEMBER 11-12, 2025 | LONDON, UK

CHINA FAMILY ENTERPRISE & INVESTMENT FORUM
NOVEMBER 12-13, 2025 | BEIJING, CHINA



FAMILY OFFICE FORUM
NOVEMBER 19-20, 2025 | PALM BEACH, FL

Campden Wealth proudly celebrates its 20th anniversary of the flagship Family Office Forum with a focus on all aspects of the family office, including operations, governance, succession planning, investment structuring, tax considerations and more. Explore the key strategies and best practices for effectively recruiting and retaining staff, determining which functions to keep in-house versus outsource, ensuring smooth transitions, and fostering sustainable growth. This forum provides a unique opportunity to learn best practices, exchange ideas, and build relationships that can help optimize family offices across generations. We'll also delve into the most common challenges family office leaders are actively addressing with proactive steps to thrive in 2026.

END OF YEAR FORUM
DECEMBER 10-11, 2025 | DALLAS, TX

IPI's End of Year Forum wraps up the year in America's heartland. What have you achieved and how has your portfolio done? Gain valuable insights from industry experts and benchmark with peers on your asset allocations at this forum. We evaluate the macroeconomic outlook for 2026 and beyond, including the indicators that the Federal Reserve will be using to evaluate inflation and interest rates, and how to take these factors into consideration when structuring and rebalancing portfolios. Themes include real estate, the energy transition, agriculture, transportation, and more.

FAMILY OFFICE FORUM
DECEMBER 11-12, 2025 | MUMBAI, INDIA

IPI is the premier, *life-long* community of private wealth investors providing *peer-to-peer* learning and sharing , access to *extraordinary* investor education, and connectivity to *best-in-class* investors. We're a *global organization* – the only *truly global* ultra-affluent community.

New York—

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