



How US Family & Private Wealth Management Offices Explore and Participate in Canadian Investment Opportunities

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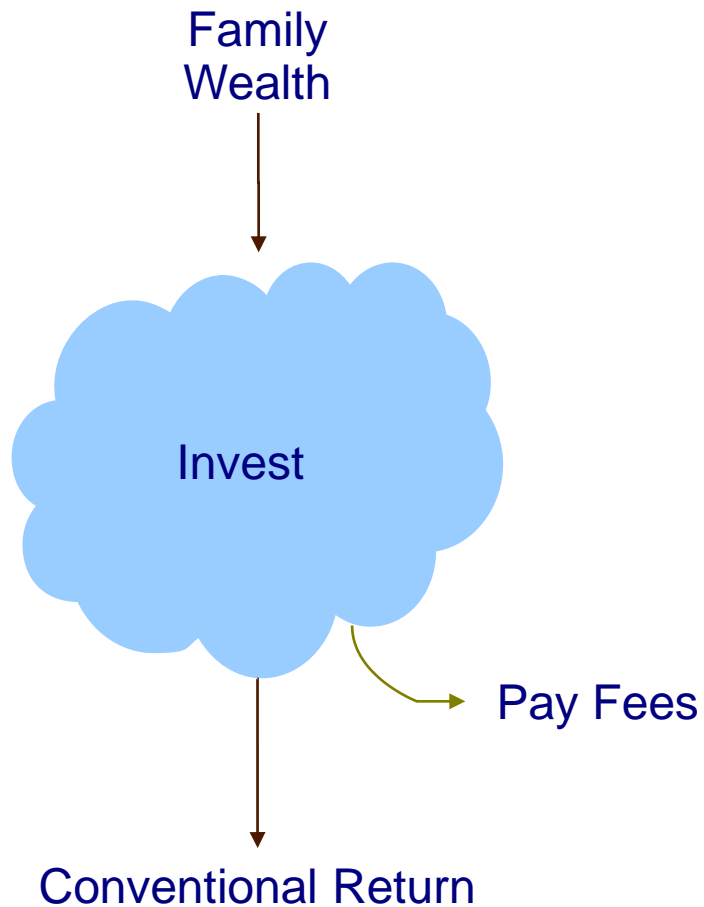
Our Scenario

The Story of the Blind Man

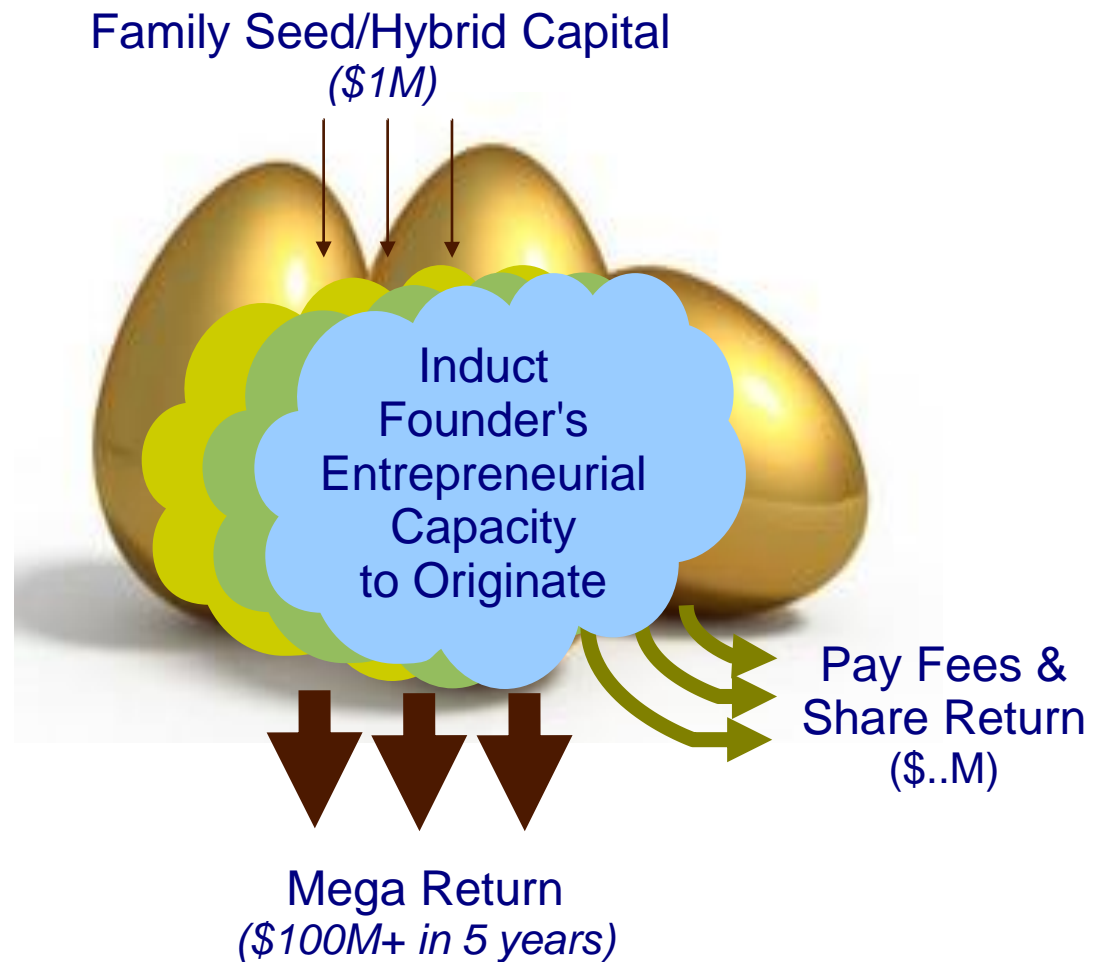
**How We Apply
Social Entrepreneurial (SE) Mindset
to Family Office
To Originate Wealth**

Our Mindset for Family Office

Conventional



Our Model

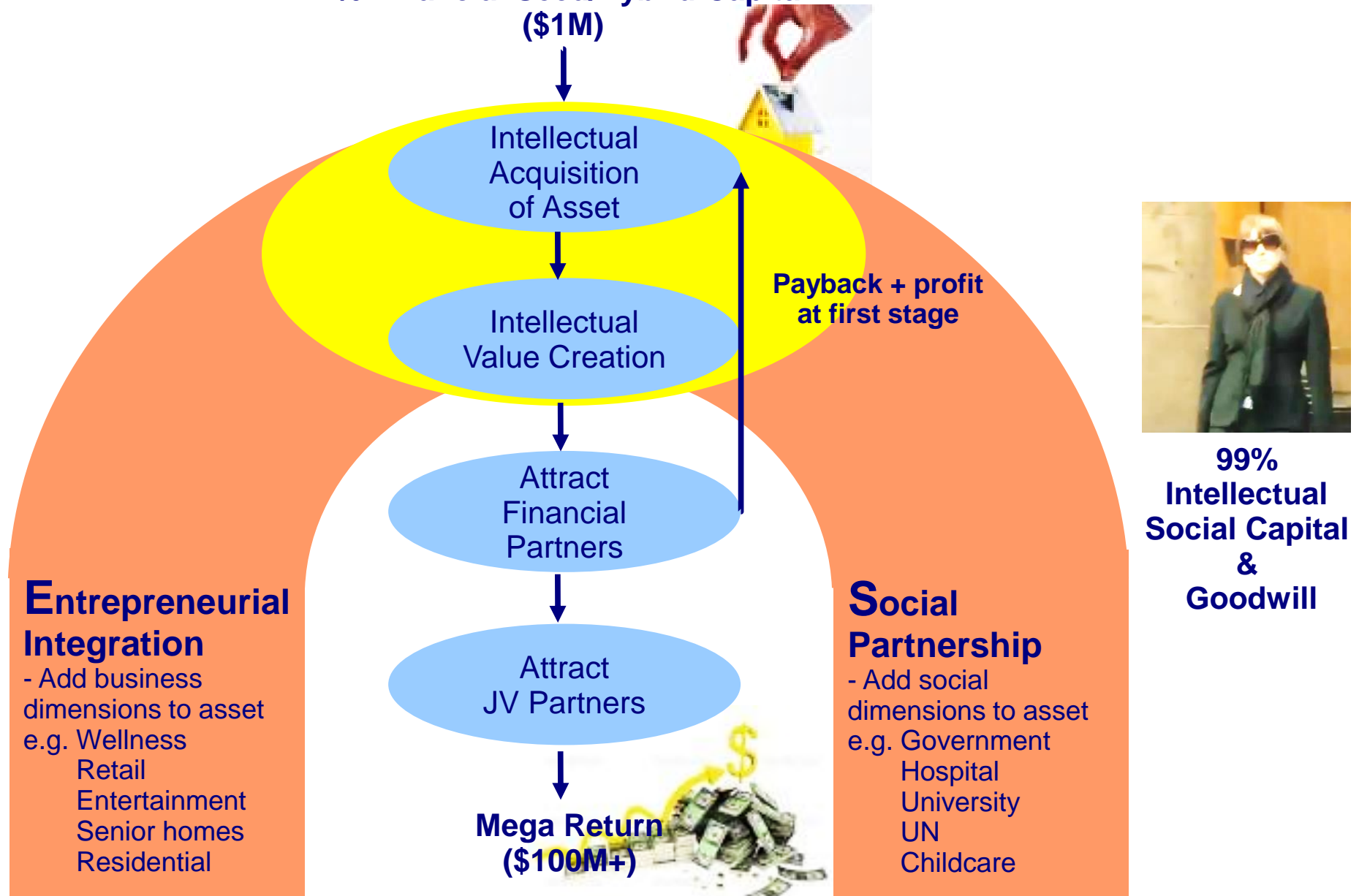


Benefits of Our Model



SE Deal Making Process

1% Financial Seed/Hybrid Capital
(\$1M)

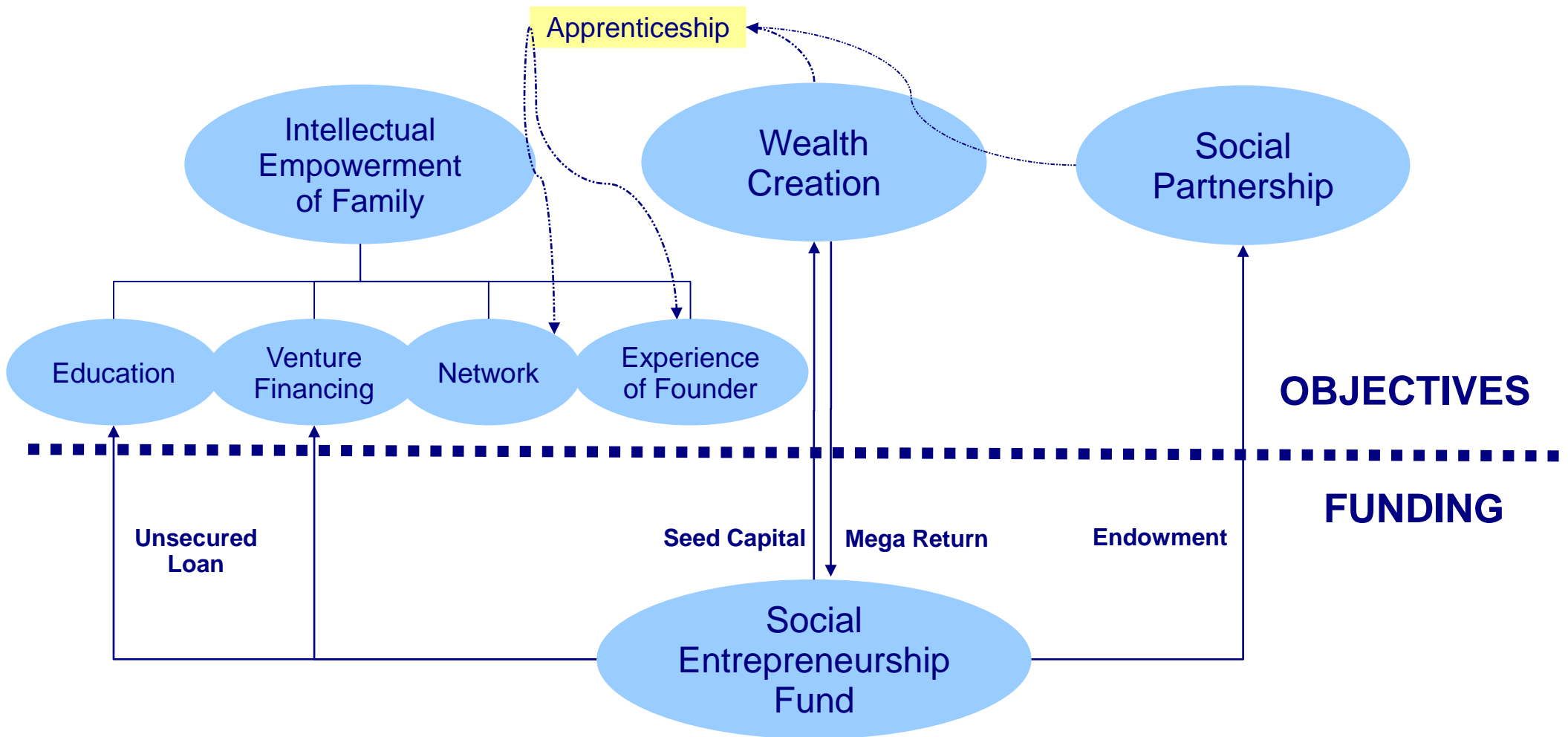


Family Office Model

2. SUCCESSION PLANNING

1. WEALTH PRESERVATION

3. PHILANTHROPY



Our Transactions

BORDERS

MARKHAM
WELLNESS
DISTRICT



Case Studies: LMJ

Loopnet

Versace

Groupon



"Wealth is when small efforts produce big socioeconomic results which we can share. Poverty is when big efforts produce small socioeconomic results with nothing to share." - Firoz Shroff

SHARING

And

Q & A

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*** You can also find this slide on the event CD.
The presentation video will be available at request.*