

RE-INVENTING EARLY-STAGE INVESTMENT STRATEGY FOR FAMILY OFFICE

REMOTE INTERACTIVE VIRTUAL SIMULCAST

EXECUTIVE RETREAT – AUGUST 2 THRU 5

RE-INVENTING INVESTMENT STRATEGY

Executive Retreat for Family Office & Investing

Introduction

Today we are experiencing the greatest technology renaissance that has occurred in our history, and with it an opportunity to create unprecedented wealth and social impact.

Global disruptive innovation is no longer confined to just Silicon Valley or to traditional corporate R&D. Last year over \$300B was invested in tech startups - exceeding a total corporate R&D spend of \$200B - drastically shifting where money is invested to create disruptive innovation.

Just as the source of innovation has shifted outside the corporation, we need to change our investment strategy. But how do we reach this pool of innovative startups? What is our investment strategy? How does our own investment approach address the opportunity presented from an exponential explosion in disruptive innovation?

During this executive retreat, we bring together family office investors, Stanford faculty, and world-class operating experts to explore exponential technology investing. We introduce frameworks including "Opportunity Targeting," "Wave Investing," and "Power of Ten Business Modeling" – all frameworks customized for family office investing.

Welcome

- **Three-Day workshop – Attend remotely through our live interactive virtual simulcast**
- **Instructors include world-class Experts from Stanford Faculty, former tech executives from Silicon Valley, and Startup CEOs**
- **Unique workshop content developed from our engagement with over 70 corporate innovation executives, 100 startups, venture capital, 400 Stanford tech labs**
- **Access to early stage technology experts from Stanford Engineering Disruptive Technology and Digital Cities Program**
- **Workshop lead by Michael Steep, former SVP Xerox PARC and operating executive with 35 years of experience in tech companies including HP, Apple, and Microsoft**



Executive Retreat Leader

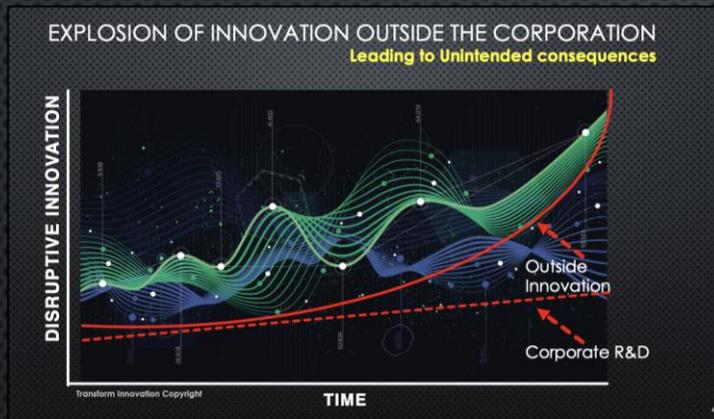
Michael Steep

Executive Director and Founder
Disruptive Technologies & Digital
Cities Program
Stanford School of Engineering

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Executive Virtual Retreat for Family Office

5 Tangible Outcomes



- 1 **Pre-Workshop Preparation Call** – we learn about your family office strategy and exposure to early stage disruptive technology to customize content cases
- 2 **Leave-Behind Process, Tools, and Organization Strategy** – how to access, navigate, and build a portfolio investment framework for early stage technology
- 3 **Direct Access to Technology and Social Impact Opportunities** – We will expose you to curated startups and their teams targeted to match your interests
- 4 **Relevant Leadership Skills For Superior Investing** – Critical leadership skills needed to lower investment risk and take advantage of new developments
- 5 **Powerful and After-the-workshop Access to Expertise** – we provide a bridge between our retreat faculty, attendees, and your team after the retreat is over



LIVE INTERACTIVE AND FACILITATED VIRTUAL SIMULCAST

- CUSTOM-DESIGNED ATTENDEE VIRTUAL EXPERIENCE
- STATE-OF-THE-ART INTERACTIVE VIRTUAL EVENT
- FULLY DEDICATED VIRTUAL EVENT FACILITATOR
- FULL ATTENDEE PARTICIPATION WITH PHYSICAL ATTENDEES
- LINKED IN ACCESS IN REAL TIME WITH FULL PROFILES AND CONNECTION FOR NETWORKING
- VIRTUAL CONFERENCE ROOMS

Curated Registration and Fees

Executive Virtual Retreat for Family Office

PERSONAL REGISTRATION AGENT

We will provide a personal registration agent who will contact you directly to manage your personal requirements, secure payment for the workshop, and register you for the event.

Attendees include C-suite-level executives, board members seeking to sustain long-term company growth in revenue and portfolio ROI, and family office principals.

Additional Information Including Fees:

www.mikesteep.com/workshops

- \$5,000 per remote attendee for our interactive virtual simulcast

3-Day Executive Retreat: family office and early stage disruptive technology investing

Participants who should attend include:

- Family Office Principals
- Portfolio Managers
- Venture Investors
- Angel Investors
- C-Level Executives
- Board Members

Transform Innovation is a California Corporation partnered with faculty from Stanford University, private corporate executives, and venture investors.

EXECUTIVE RETREAT LEADERSHIP TEAM



Michael Steep

Senior executive who ran global operations for Apple, Microsoft, and former SVP of the world-renowned Xerox PARC. He has built, managed, and helped transform Fortune companies by leveraging the power of disruptive technologies to deliver innovation.

Founder and Executive Director of Stanford Engineering Disruptive Technology and Digital Cities Program. Author of the book *First Light of Day*.



Ronald S Diamond

Chairman and CEO, Diamond Wealth Strategies. Mr. Diamond graduated Northwestern University. Diamond worked at Drexel Burnham Lambert working in high yield, investment banking, and money management. He became a Managing Director at Bear Stearns managing over \$1 billion for high net worth individuals. After Bear Stearns, Diamond launched a \$250 million hedge fund using his proprietary strategy.



Marcus Shingles

Partner and VP, Bain Consulting
Over 20 years of management and leadership experience across premier global organizations, governments, and prominent startups, specializing in innovation and digital transformation
Former CEO XPRIZE and Partner, Deloitte



Ray Levitt

Retired Kumagai Professor of Engineering
Academic Director, Stanford University and is a noted partner in venture investing. He is a global expert on civil engineering and a renowned expert in his field.



Ram Rajagopal

Associate Professor of Civil Engineering, Stanford University
Specialized in creating and deploying large sensing systems using the generated data with novel statistical algorithms and stochastic control to achieve sustainable infrastructure networks.

Academic Director of Stanford Engineering Disruptive Technology and Digital Cities Program.



Bruce Cahan

Lecturer in Stanford's School of Engineering, where he applies new theories for durable financial and marketplace. Bruce created and has courses in finance at including *Sustainable Banking*, *Understanding the Wall Street*, *The Ethics of Financial Engineering* and *Post-Disaster* advises startup teams in and abroad.

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SAMPLE AGENDA

Re-Inventing Investment Strategy for Disruptive Technologies Three-Day Executive Workshop		
Day 1 9am Start Virtual Session Begins	Day 2	Day 3 Noon Departure
Module 1: The New Framework – Disruptive Innovation	Module 6: Developing a Path to Wave Investing	Module 11: Access, Networking, and Assessment of Network Experts
Module 2: Anatomy of Wave Investing	Module 7: Advanced Disruptive Technology Business Modeling	Module 12: Summary and Concluding Comments
Module 3: Disruptive Technology and the Power of Ten	Module 8: Developing Your First Portfolio	Departure at Noon
Embark Mapping Process	Module 9: Bruce Cahan and Technology Investing	
Module 4: Team Breakouts Virtual	Module 10: Startup Roundtables	
Module 5: Social Impact Investing		

RE-INVENTING INVESTMENT STRATEGY

Client Feedback on Prior Executive Retreats

Groundbreaking Approach on Disruptive Innovation

"Steep and his team of experts from Stanford and the corporate world have truly created a genuinely unique and extremely useful approach to disruptive innovation that can make all the difference for our company's innovation team. It truly is a reinvention of disruptive innovation in every sense of the phrase." Cushman and Wakefield Leadership Team, Chicago.

A Fresh Approach to Looking at Technology Disruption as a Growth Opportunity

"What makes people sit up and listen on a Sunday morning at the end of a partner retreat? The answer is now clear – hearing an enlightening, thought-provoking series of fresh ideas on new technologies that are finding their way into the marketplace. Michael, as you had promised, your presentation delivered that and more." – Margaret Poster, COO, Willkie, Farr & Gallagher

Technology Disruption Grounded in Real-World Application

"The most valuable part of it was how Steep tied his presentation to a real-world application. The internet as we know is filled with hobbyist websites that rarely tie together buzz word technology to real applications and problems. To truly differentiate 'disruptive' technology from just another science project that's gotten a lot of media attention is exactly what his presentation did." – David Lemon, Senior Systems Engineer, Juniper Networks

Cutting Edge Concepts Transformed into New Business Models

"Mike introduced a new concept, Continuously Connected Value Chain, at the keynote and it was really eye-opening. His clear explanation helped us understand how we could leverage it to create new processes and business models. Mike shared concrete examples of how critically important an understanding of disruptive technology is in driving innovation in our industry. Based on Mike's recommendations, we are now evaluating a major supply chain platform and designing transformational capabilities by leveraging and integrating newly available data and technology. We anticipate these actions will add significant value to our operations and partners.– Paul Helmering, Vice President