FAMILY OFFICE FORUM

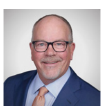
First Trust
Family Office Practice

FIRST TRUST FEATURED SPEAKERS

Our featured speakers and participating families look forward to sharing trends and timely insights facing today's family office community.

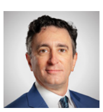
James Bowen | Chief Executive Officer

Building and preserving wealth often requires generations of dedication and sacrifice—a testament to the resilience of critical thinkers who lead, live, and nurture the American family legacy. Jim Bowen, the General Partner, and CEO of First Trust, honors the disciplined, risk-taking entrepreneurs who drive progress through innovation and competition with a commitment to their employees and long-term business health. We are a nation built by toilers, builders, inventors, and doers. At the heart of America's story is the value of hard work and ingenuity—the foundation of her businesses and the force behind her continued exceptionalism. The United States is a formidable global superpower, one driven by the homegrown owner and operator vision of capitalism that propels future wealth creation. With over thirty years as both an owner and an operator, Jim's core focus has been to provide resources and innovative solutions to protect, preserve, and grow wealth across generations. He looks forward to sharing his perspectives on the global landscape, economic trends, and the evolving challenges and opportunities that impact family practices today.



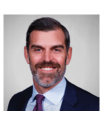
Brian Wesbury | Chief Economist

The election of Donald Trump is reminiscent of the election of Ronald Reagan. It marks a shift from one administration that expanded government to another aiming to reduce it. The post-election stock market rally suggests that investors anticipate positive changes, much like when Reagan cut tax rates, reduced regulations, and slowed spending. However, history doesn't repeat itself; it rhymes. The world today is not the same as it was in 1980. How will Trump's policies affect the economy, markets, and inflation? This and more from Brian Wesbury, Chief Economist of First Trust.



Robert Stein, CFA | Deputy Chief Economist

Now that the presidential election is over, what will one-party unified control of the White House, Senate, and House mean for economic policy in the next two years? Bob will rely on his background as a former official at the U.S. Treasury Department and Chief Economist for the Senate Budget Committee to discuss the outlook for taxes, entitlements, and other spending programs. He will also discuss the manageability and policy implications of the national debt as well as the outlook for the U.S. economy, housing, and stock market. In addition, Bob will provide a peek ahead at the elections in 2026 and 2028.



Rob Biddinger | Managing Director, Capital Solutions Group

Rob is a Managing Director for the Capital Solutions Group at First Trust Portfolios L.P. The Capital Solutions Group focuses on working with financial professionals to democratize alternative investments, across the accreditation chain, to the retail public.

Michael Grayson | Portfolio Manager

Michael Grayson is a Portfolio Manager at First Trust Capital Management L.P. ("FTCM"). Michael focuses on FTCM's event-driven and multi-alternative mandates as well as private market platform.

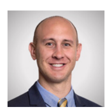
Devin Iafelice | Senior Vice President, Private Markets - Capital Solutions Group

Devin works with the First Trust Capital Solutions Group and supports external relationship managers, specifically focusing on Private Asset Platform distribution and semi-liquid registered fund offerings throughout the US.

RESEARCH PANEL | Hosted By: Rob Biddinger

Brian Murphy | Portfolio Manager

Brian is a Portfolio Manager on FT-AIR's research team, in the First Trust Capital Solutions Chicago headquarters. In that role, Brian is responsible for managing all aspects of FT-AIR's investment research and diligence process. He has a particular expertise in evaluating alternative strategies and helps manage the dedicated First Trust Alternative Investment Research analyst team with respect to their work in that area. He is also a member of the Investment Committee. Brian brings to bear more than 12 years of alternative investment experience having held research roles at both single strategy and multi-manager alternative asset management firms.



Nicholas Lotysz | Director of Operational Due Diligence

Nicholas is the Director of Operational Due Diligence at First Trust Capital Management. He performs operational due diligence reviews of managers and ongoing manager monitoring.

FEATURED GUEST SPEAKERS

Steven J. Thayer | Partner, Ice Miller LLP

Joshua Volen | Co-Founder and Principal, CIRE Equity

Ben Hilgers, CFP® | Director of Investor Relations, CIRE Equity

Speaker line-up subject to change without notice.