



CTA Summit

September 11th, 2025
 Union League Club Chicago
 Chicago, IL

Thursday, September 11th, 2025

7:30 AM	Exhibit Set-Up		
8:00 AM - 6:00 PM	Registration/Information Desk & Exhibit Hall Opens All confirmed pre-registered delegates must approach the Registration Desk to check in and pick up conference badges. Business Cards are required to retrieve badges.		
8:00 AM	Networking Breakfast		
9:00 AM	Opening Remarks By: Dennis Rivera, Managing Member Founder, Advanced Alpha Advisers LLC		
9:05 AM	“Navigating Volatility: The Role of CTAs in Uncertain Markets” <i>Insights on how CTAs thrive during volatile periods and strategies to mitigate risks</i> <table border="1"> <tr> <td>MODERATOR: Omer Ahmed, President, Abaris Capital Advisors LLC</td> <td>PANELISTS: Name, Title, Company</td> </tr> </table>	MODERATOR: Omer Ahmed, President, Abaris Capital Advisors LLC	PANELISTS: Name, Title, Company
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9:50 AM	“AI and Machine Learning in Managed Futures” <i>How technology is revolutionizing data analysis, trade execution, and decision making</i> <table border="1"> <tr> <td>MODERATOR:</td> <td>PANELISTS:</td> </tr> </table>	MODERATOR:	PANELISTS:
MODERATOR:	PANELISTS:		



	Name, Title, Company	Name, Title, Company
10:35 AM	<p>DEBATE: "Systematic Strategies vs. Discretionary Insight: Where Should Allocators Bet in Commodities?"</p> <p><i>If you had \$100 million to deploy in today's volatile commodity markets, would you trust the machine or the human or both?</i></p>	
	<p>MODERATOR: Dail St. Claire, President, St. Claire Advisors</p>	<p>PANELISTS: Omer Ahmed, President, Abaris Capital Advisors LLC</p>
11:30 AM	Networking Break and Refreshments	
11:50 AM	STANDALONE	
	Presented by:	
12:15 PM	<p>"Winning Institutional Capital: Perspectives from CTAs and Allocators"</p> <p><i>Strategies, signals, and red flags from both sides of the table</i></p>	
	<p>MODERATOR: Kamil Homs, Founder, GRC Investment Group-Dubai (SFO)</p>	<p>PANELISTS: Name, Title, Company</p>
1:00 PM	<p>"Digital Assets, Blockchain and Smart Contracts in Commodity Trading"</p> <p><i>Potential of blockchain for improving transparency and efficiency in futures trading</i></p>	
	<p>MODERATOR: Name, Title, Company</p>	<p>PANELISTS: Name, Title, Company</p>
1:40 PM	Networking Luncheon	
2:45 PM	<p>"Commodity Trading in the World of Tariffs: Navigating Policy Shocks and Pricing"</p> <p><i>How tariffs and trade restrictions influence futures pricing and volatility</i></p>	
	<p>MODERATOR: Aaron Lupuloff, Senior Executive Director, Gwinnett</p>	<p>PANELISTS: Name, Title, Company</p>



	County Public Schools			
3:30 PM	STANDALONE			
	Presented by:			
3:55 PM	TBA			
4:40 PM	<p>“Sustainability in Commodities: Opportunity or Constraint for General Managers?” <i>Can environmental or social factors lead to better trading signals or risk mitigation?</i></p> <table border="1"> <tr> <td>MODERATOR: Name, Title, Company</td> <td>PANELISTS: Name, Title, Company</td> </tr> </table>	MODERATOR: Name, Title, Company	PANELISTS: Name, Title, Company	
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5:10 PM	Closing Remarks			
5:15 PM	Cocktail Reception			
7:00 PM	Conference Concludes			



PAST ATTENDEES AT OPAL'S FAMILY OFFICE EVENTS AND PRIVATE WEALTH SUMMITS

FAMILY OFFICES / PRIVATE WEALTH / RIA's

CEO, Elle Family Office (Lazarian Family SFO)
Managing Partner, Elle Family Office
Head of Private Capital, Balentine
Chief Executive Officer, Intersection Impact Fund/The Wealth and Family Office Management Group (MFO)
Trustee, Idlette Family Trust
Director of Investments, CI Investments (SFO)
Managing Director, Avalon Capital Management
President, Coomber Family Estates (SFO)
Founder, GRC Investment Group Dubai (SFO)
Managing Partner, SP Group Capital Partners LLC MFO
Managing Member, Elle Family Office (Lazarian Family SFO)
Managing Director, Elle Family Office (Lazarian Family SFO)
Chief Executive Officer & President, B4MC Group Black Momma Brands (SFO)
Principal, The Klotz Companies, Klotz Family Office (SFO)
Sr Director, ChickfilA Corporate Cathy Family Office
Managing Director - Head of Global Equities, Attucks Asset Management
Managing Partner, Known / Living Cities
Managing Member, Avella Private Wealth, LLC
Director Portfolio Management, TAG Associates
Managing Director, Tecumseh Alternatives, LLC
Co-Founder of Priceline.com, Founder, World Youth Horizons
Director of Investments, Fuqua Capital Corporation
Director - Tax and Generational Planning, Cox Family Office (SFO)
Director of Capital Markets, Grupo Ferré Rangel (SFO)
Family Office Executive, Modi Global (SFO) / Ish Family Office (SFO)
CEO, Trademark Capital Management, Inc.
CEO & CIO, Acansa Investment Management Group
Director Investments, Hermann Family Office
Director, The Li Family Office (SFO)
Founder, Lindeque Family Office
Strategic Investments Manager, Mongo Holdings LLC (SFO)
Chief Financial Officer, Mongo Holdings (SFO)
Chief Executive Officer, Ferguson Family Office (SFO)
Chief Executive Officer & Chief Investments Officer, Mongo Holdings (SFO)
President, Quad Iron Enterprise LLC
Co-Founder, Catalyst Apollon
Director of Trust and Wealth Management, Argent Trust Company
Chief, Investment Officer & Partner, Pax Fortis Multi-Family Office
Former network affiliate TV anchor, Founder, Heartstrong Media. Heartstrong Books
CIO, Tano Capital (SFO)
Founder, Izenda (SFO)
Principal, DNA Partners

PENSIONS / CONSULTANTS

Managing Member, Advanced Alpha Advisers LLC
Chair of Investment Board, City of Atlanta General Pension Fund
Chief Investment Officer, Pennsylvania Public School Employees Retirement System



CTA
Summit



Investment Officer, LA Fire and Police Pensions
President, The Hackett Robertson Tobe Group (HRTG)
Vice President, Callan
Director of Diverse & Emerging Manager Strategies, Office of New York City Comptroller Brad S. Lander
Investment Analyst, ERS
Chairman, City of Jacksonville Retirement System
Principal, Meketa Investment Group / Mass PRIM

ENDOWMENTS / FOUNDATIONS

Director of Investment Operations, Spelman College Endowment
Vice President, Rhode Island College Foundation
Chief Financial Officer, The Walters Art Museum
2X All Pro NFL Veteran, Founder and CEO, The Ovie Mughelli Foundation
Emeritus Trustee, Finance Committee Member, Pennsylvania State University
Board Member, The Heritage Music Foundation
Senior Vice President and Chief Financial Officer, National Urban League
Co-Founder of Priceline.com, Founder, World Youth Horizons
Founder, Foundation for Legacy, Stewardship & Innovation (FLSI)
Senior Executive Director, Gwinnett County Public Schools Foundation
Board of Directors, NAAIA Foundation

FUND OF FUNDS / OTHER INSTITUTIONAL INVESTORS

Senior Associate, Gatewood Capital Partners
Georgia House of Representatives, District 95, Founder, Kairos Capital Legal Advisors
Investment Officer Manager Research & Investment Strategy, Xponance
Partner, 747 Capital LLC
Manager Selection, Boothbay Fund Management
Director, Lighthouse Partners
Managing Partner and CEO, Tech Wildcatters
Managing Director, Gatewood Capital Partners
Co-Founder and Chief Impact Investment Officer, Abundance Capital
Managing Partner, Proviso Capital
SVP, Diversity and Inclusion Officer, Ameris Bank
Co-Founder & Head of Partnerships, Catalyze
Co-Founder, Impact Pathways Inc.
Founder, Engage
Chief People Officer, TOCA Football
Consultant, Alternative Finance and Business Strategies
Managing Partner, Ignite Fund of Funds

EMERGING MANAGERS / SERVICE PROVIDERS

Blue Mahoe Capital
Golden Eagle Strategies
CRE-Endeavors
The Proactive Realty Group, LLC
Alta Trust
Grafine Partners
Merlynn Real Estate Partners
Barrier Capital Management, LLC
Sequence Financial
Caymus Equity Partners
Gray Harbor Capital



Pasadena Private Lending LLC
Withum
Carrack Capital
Reliant Real Estate Investments
First Check Ventures
Qubits Ventures
Outside VC
Team Ignite Ventures
VHS Ventures
Not Yet Ventures
Suncoast Ventures
Weave Ventures Fund I, LP
Neuvation Ventures Fund 1
Taika Capital
Geek Ventures
Prager Metis
Avila Capital
Decatur Capital Management Inc
Stratus Financial LLC
Rockstreet Investments LLC
The Zenith Companies
Helix33
Cusana Capital LLP
DL3 Realty, L.P
Vallary Capital Partners
Qtron Investments
KPMG
Ooblix
Beacon Venture Partners
Bergen Park Capital
Canary Capital
o15 Capital Partners
Next Billion Capital Partners
SoundCore
Brilliant Minds

