

NextGen New York Seminar

With deep dedication.
Deutsche Bank



Monday, June 22

Deutsche Bank Center
One Columbus Circle, New York, NY

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| 8:30 am | Arrivals and breakfast |
| 8:45 am | Welcome and introductions
Management team |
| 9:30 am | Session: Investing 101
Maureen O'Toole, Wall Street Prep
The importance of financial literacy and investing including establishing financial goals and risk tolerance will be reviewed in this session. Working in teams, you will analyze, and rank Investments based on historical risk adjusted returns. Teams present and shares their analysis. |
| 12:30 pm | Lunch meetings with management |
| 2:30 pm | Session: Markets outlook
Deepak Puri, Chief Investment Officer, Americas
An analysis of current economic and financial landscape including our outlook on macroeconomics and various asset classes. |
| 3:30 pm | Session: Investments
Jim Donofrio, JP Egui, Ben Loneke and Ed Sibilis
An introduction to the investment process for Wealth Management clients highlighting the DPM organization and the ways we invest on our clients' behalf. We will also review fixed income investing including bond types, interest rates, credit ratings and portfolio allocations. |
| 5:30 pm | Event: Networking reception
Ascent lounge
10 Columbus Circle, 4 th floor |
| 7:00 pm | Day concludes |

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Tuesday, June 23

Offsite visits to NYSE and NYC Culture Club

- 9:45 am **Event: Meet at NYSE, 11 Wall Street**
Meet at white tent at the corner of Wall and Broad Streets.
An exclusive opportunity to access the floor of the world's largest stock exchange.
- 11:30 am **Depart NYSE – 5 minute walk to World Trade Center**
- 12:00 pm **Event: 3 World Trade Center**
Exhibition and studio tour at 3 World Trade Center
Afternoon will be hosted by NYC Culture Club. Co-founders Clayton and Parker Calvert will take the group on a tour of the top floor to view an exhibition rich in history and full of material telling the story of the redevelopment of the WTC. It will include a chance to see part of the set of the hit tv show *Succession* as well as, visits to the artists' studios located in the building.
- 1:15 pm **Lunch onsite** – Caviar and champagne tasting along with classic New York style pizza from the Greenwich Village institution – Joe's Pizza.
- 2:00 pm **Session: Current trends in the art market**
Parker Calvert, Co-founder, NYC Culture Club
Rob Suiter, Senior Director, Winston Artory Group
Jacqueline Valouch, Head, Wealth Planning, Trust, Custody and Alternatives, Wealth Management
This panel will explore the key forces shaping today's global art market, from shifting collector demographics and digital innovation to evolving gallery, art advisory and auction dynamics. Speakers will share insights on market resilience, emerging trends, and what these developments mean for collectors, investors, and institutions in the year ahead.
- 3:00 pm **Session: AI innovation and controversy**
Parker Calvert and local artists
This panel will examine how artificial intelligence is transforming the art world, while addressing the ethical, legal, and creative tensions it raises for artists, institutions, and collectors.
- 4:00 pm **Day concludes**

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Wednesday, June 24

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- 9:00 am **Session: Tour of our art collection at Deutsche Bank Center**
Blaire Sacks
Deutsche Bank has a world-renowned contemporary art collection, with works being acquired since the late 1970s. We will tour highlights of the collection at our U.S. headquarters.
- 10:00 am **Session: Fireside chat with CEO of Deutsche Bank Americas**
Lisa McGeough, Head of Deutsche Bank Americas
Anthony Valvo, Head, Deutsche Bank Wealth Management US
This fireside chat will provide an overview of our other divisions including the Corporate Bank - to hear about future opportunities for the bank as well as the importance of culture.
- 10:30 am **Session: Navigating the family office**
Michael Nelson, Managing Partner, Eagle Bay Family Office
What is a family office and who needs the help of a family office. An examination of the complexities of choosing the right family office. What does it mean to manage a family office, what family offices should consider when evaluating wealth management partners, plus the role of impact investing.
- 11:30 am **Session: Preparing for your family's wealth conversation**
Max Disney, Board Chairman of the Roy and Patricia Disney Family Foundation
During this 90 minutes session, you will hear from a next generation perspective, how to understand your unique position and ways you can contribute in a meaningful way.
- 1:00 pm **Lunch break**
- 2:15 pm **Session: Sports M&A and financing**
Arjun Nagarkatti, Head of Private Bank, US & Europe International
The business of sports is evolving. This discussion will cover this sector and where it is headed.
- 3:30 pm **Session: The 10% Entrepreneur**
Patrick McGinnis, Venture capitalist and author
A revealing discussion of the realities of full-time entrepreneurship, plus a look at the benefits of traditional careers versus non-traditional ones and the available opportunities for each.
- 5:30 pm **Event: Farewell reception – Rosa Mexicano, 44 West 63rd Street**
- 8:00 pm **Event concludes**