

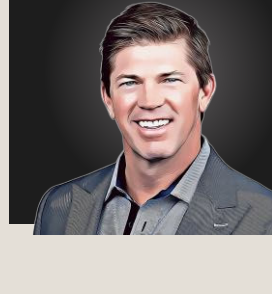
EVENT RECAP

Entrepreneurial Wealth: Growth & Preservation Strategies

July 9, 2024

Rosewood Mansion on Turtle Creek

Dallas, TX



Kevin Gray
CEO
Veracity Capital



Ross O'Brien
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Rodney Woods
Founder & CEO
Playbook Investors Network

In a continuing effort to convene our network of investors and collaborators who share our mission to advance the therapeutic potential of controlled substances, BVE partnered with Veracity Capital, a leading boutique wealth management firm and hosted a recent private wealth symposium. The event provided an engaging discussion on key aspects of entrepreneurial wealth, including generating wealth through entrepreneurship, preserving wealth, and growing wealth for the future. The symposium took place in the exquisite backdrop of the Rosewood Mansion on Turtle Creek in Dallas.



What We Learned



Managing Entrepreneurial Wealth requires a team of trusted advisors who can effectively navigate a changing regulatory landscape, customize family specific solutions and tap into hard to access alternatives to create an economic engine for the future.

As we look ahead its no longer enough to protect against downside volatility. This is a time where wealth is most impactful when managed by a cohesive team with purpose and intent.

Estate tax exemptions are changing in 2026, so planning needs to start now

Integrated Wealth Management & The Power of Alternatives

REGULATORY & TAX

THE POWER OF ALTERNATIVES

ADVISORS & TEAMS

Alternatives & Venture Capital specificity are the keys to exponential growth:

- ↑ High risk
- ↓ Low correlation to macro volatility
- ↑ High returns
- ↓ Low / hard to access

Wealth creators need a team of trusted advisors working together with family members to create the optimal strategy bespoke to each individual's unique situation



L to R: Derrick Mayes, Ross O'Brien, Michael Irvin, Kevin Gray, Rodney Woods

en·tre·pre·neur·i·al wealth

[ahn-truh-pruh-nur-ee-uhl welth]

noun

1. Accumulating resources by successfully building companies such that value created can be extracted through liquidity events to build personal wealth.
2. Using entrepreneurial acumen and wealth to build a future economic engine based on purpose and impact.

