

Take the lead amidst a constantly changing business landscape ...

For family-controlled companies, the aspiration to grow and perform long-term – often beyond generations – is deep-rooted. Staying at the top of one's game is not achieved by standing still, but rather by staying agile.

Today, in response to the exponential rate of change at which businesses are being impacted by industry transformation, we have set up the NextGen Academy Disruptive Tech Program.

This Palo Alto-based program, originally designed for the international C-suite, is exclusively tailored to nextgen leaders. It allows you to brainstorm with your global peers how you and your family business can gain a strategic understanding and truly capture the benefits of advanced technologies.

Ultimately, the program is a unique opportunity to invest in your own development, with significant implications for your family business and career.



Lauri Oinaala
EY EMEA Family Enterprise Leader
EY Global NextGen Leader

Understand the future and thrive as a nextgen leader

July 2023 | Palo Alto, Silicon Valley



... and visualize the future!

Our aim is to create an exceptional learning experience that makes you think more expansively about technology's impact on your industry, your family business with all family dynamics that come with it, and you.

Guided by a hand-picked team of Silicon Valley trailblazers and EY professionals, you'll spend five, dynamic days immersed in disruptive technologies, concepts and future trends to visualize and map your organization's next decade.

Thanks to our three-pillar approach to immersive learning (scan, focus and act) you'll practice scanning the horizon, while developing an exponential mindset, and gaining the tools to define your way forward.

Completing the program, you'll graduate ready to act, lead the pack and see deep into the future.



Riaz Shah
Program Host
EY Global Learning Leader

A 5-day immersive learning experience in Silicon Valley

Boot camp to navigate disruption

Encounter the power of disruptive tech and discover the implications for your family business and its various stakeholders.

Think like futurist

Contextualize the latest technological advances to stay agile in uncertain times.

Mentored by game-changers

Engage first-hand with Silicon Valley trailblazers, entrepreneurs, venture capitalists, family enterprise specialists and academic faculty as speakers and program contributors.

Connect with your peers

Network with global participants with different roles and professional backgrounds in family enterprise who share your values and are committed to staying ahead of the curve.

NextGen Academy Disruptive Tech Program is designed for those who have, or are about to have, decision-making roles within their family-controlled entities (operational roles, board positions, owner roles, etc.). The participants are not expected nor required to have any prior technological knowledge.

NextGen Academy

15

years shaping global leaders

900+

members in world-class alumni network

80

countries with alumni members

44%

female nextgen leaders

NextGen Academy has been a global front-runner in next-generation leadership development since 2008. The pioneering executive education programs and extensive, world-class alumni network of over 900 nextgen leaders and board members are a testament to our long-standing dedication to working with transformative family business and family office leaders.



Dr. Tiffany Vora, speaker and expert in Biotechnologies, Health, & Innovation



Spend five days of immersive learning at EY Tech University, a purpose-built, collaborative space designed for learning and promoting networking in downtown Palo Alto.



EY Tech University (EYTU) is uniquely located at the very center of Palo Alto, only a step away from the historic Hewlett Packard Garage, where the tech giant was founded and what is considered the birthplace of Silicon Valley. Downtown Palo Alto and adjacent Stanford University grounds provide an excellent, walkable environment for exploring numerous focal points in Silicon Valley. It's a great place for dining and shopping or any sports activities, such as morning runs to energize your day.

Let Silicon Valley innovators share with you their personal insights as you network with NextGen peers and learn directly from family enterprise professionals.

Ten visionary speakers will keep you focused and engaged throughout EYTU's five-day program, while the facility's unique design provides ample space for gatherings and direct outdoor access to enjoy California's famed climate.



Agenda

Day 1

Registration by 2:00 p.m.
Westin Palo Alto

3:00 p.m. to 6:30 p.m.
EY Tech University (EYTU)

Welcome – Riaz Shah and Lauri Oinaala
Agenda overview, sessions and speakers.

Participant introductions
Get to know your peers through an interactive session.

Triggers for transformation in family enterprises – Lauri Oinaala
Disruptive technologies and their increasingly important role in family-controlled entities.

6:30 p.m. to 9:00 p.m.
Downtown Palo Alto

Evening walk and Palo Alto orientation
Get to know the Program's locations in the center of Palo Alto and around Stanford University.

Networking reception and dinner at Local Union restaurant

Day 2

7:00 a.m. to 8:00 a.m.

60-minute morning run (optional)
Start your day with a run around Stanford University grounds.

9:00 a.m. to 4:00 p.m.
EYTU

Orientation to Day 2 – Riaz Shah and Ingrid Shults

Family governance and innovation – Lauri Oinaala
Effective governance structures in navigating complex family dynamics and enabling a culture of innovation.

Intro to exponential thinking – Pascal Finette
Exponential tech, strategic foresight, social entrepreneurship, tech innovation, and design.

Future of AI – Michael Housman
The AI revolution, how we got here, and the implications on your business.

Quantum and cryptography – Michael Housman
Computer vision, natural language understanding and generation, and cognitive computing.

4:00 p.m. to 9:00 p.m.
Stanford grounds

Leading in uncertainty – Dan Klein
Improvise to develop resilience and thrive as a leader.
Session will be held outside at the Stanford Oval.

Walking tour of Stanford – Dan Klein
Walk around the grounds of one of the world's best-known universities with Stanford Graduate School of Business faculty member, Dan Klein.

Dinner at Stanford Faculty Club

Day 3

7:00 a.m. to 8:00 a.m.

60-minute morning run (optional)
Run around Sand Hill, home to some of the world's best-known venture capital firms.

9:00 a.m. to 5:00 p.m.
EYTU

Recap day 2 – Riaz Shah
Discussion and reflection on previous day's learnings.

Metaverse – Aaron Frank
Deconstruct the metaverse hype and learn how the gaming community is shaping our future worlds.

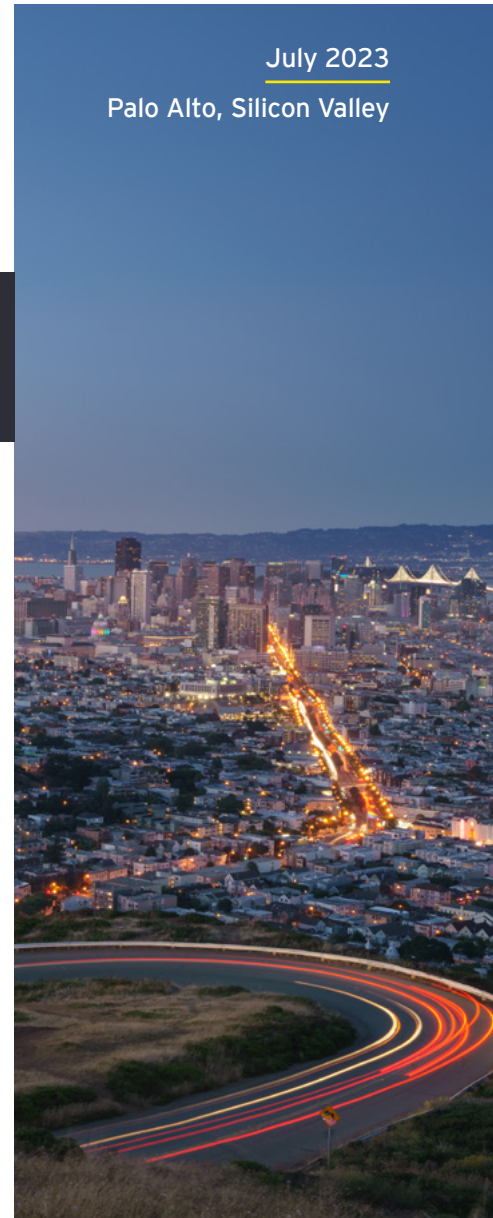
AI & Big Data in healthcare – Raymond McCauley
The rise of AI-driven healthcare, the death of Pharma, and the future of programming medicine.

Future of nutrition – Dr. Tiffany Vora
The future of agricultural tech in machine learning, robotics, synthetic biology, block chain, new proteins and more!

5:00 p.m. onward free evening

CONTINUE

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Palo Alto, Silicon Valley



Agenda

Day 4

9:00 a.m. to 6:00 p.m.
EYTU

Recap day 3 – Riaz Shah

Opening session and reflection.

Future of work – Riaz Shah

New trends in the workplace and how to stay ahead in a rapidly changing world.

Strategies for innovation – Pedram Mokrian

The art and science of adopting a successful, long-term innovation strategy; what can be learned from observing and understanding the venture industry.

Future of finance – Shuo Chen

How AI and blockchain technologies allow every company to be in financial services.

Interview – Bay Area C-suite fireside

6:00 p.m. to 9:00 p.m.
Palo Alto

Palo Alto Challenge

Interactive adventure around Silicon Valley's most notable points of interest.

AI fresco dinner

Cocktails & dinner at Palo Alto rooftop.

Day 5

7:30 a.m. to 8:30 a.m.

60-minute morning walk (optional)

Walk around University Avenue, pass by the first Apple store and pick up coffee at the famous local start-up venue Hana Haus.

8:30 a.m. to 2:00 p.m.

EYTU

Recap day 4 – Riaz Shah

Future Mapping – Riaz Shah

With an agile framework learn through this interactive session how to anticipate and plan for future developments.

Managing innovation: Family and Business Paradox – Lauri Oinaala

Balancing family dynamics and business needs related to innovation and transformation.

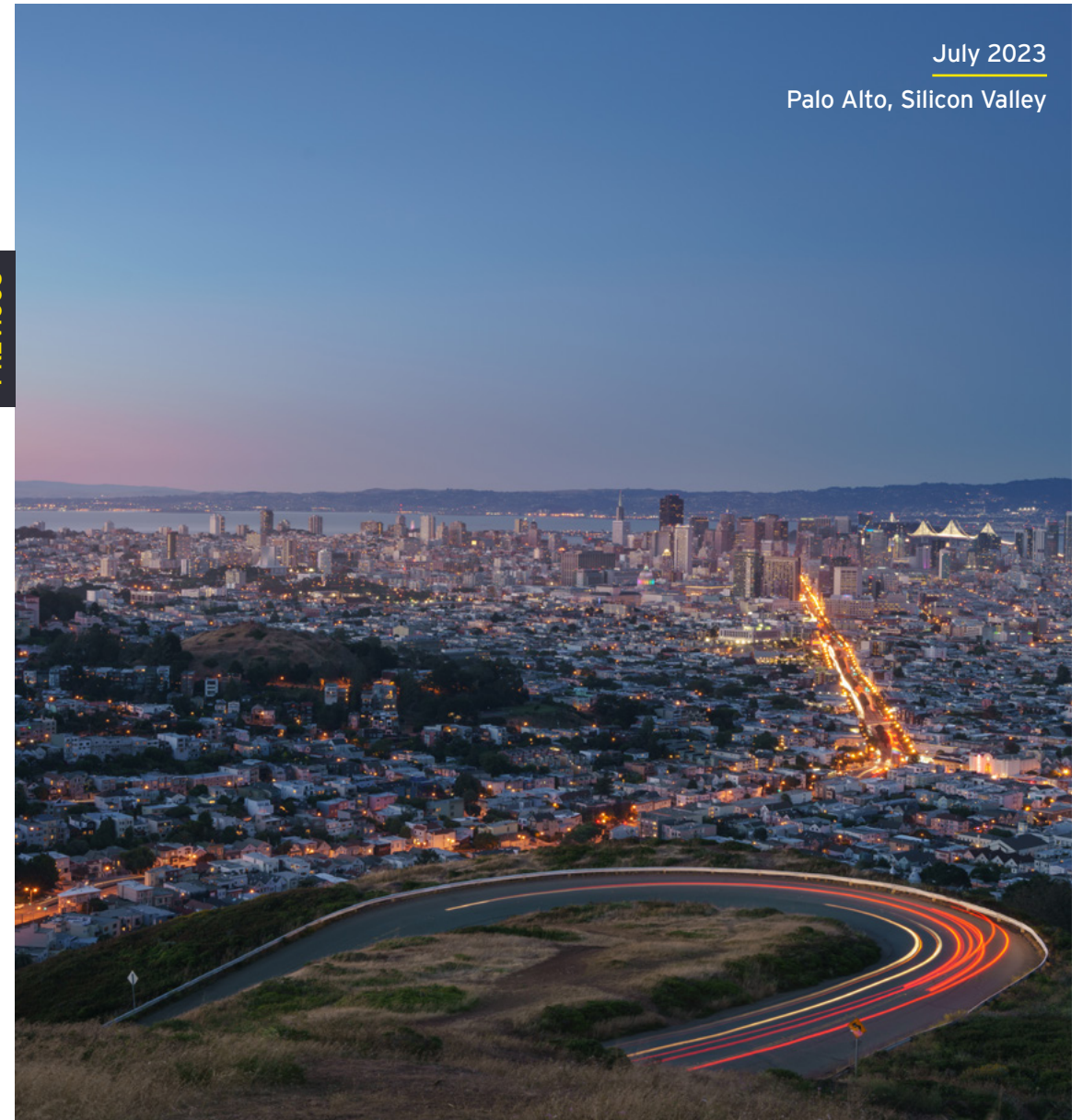
What will you do next – Program Team

Reflect on key learnings and consider how to influence and implement change within your organization.

Networking lunch at EYTU

Program concludes at 2:00 p.m.

PREVIOUS



July 2023
Palo Alto, Silicon Valley

* The agenda and speakers are indicative and can be subject to change.

How to join

Organizational details

Eligibility

The NextGen Disruptive Tech Program is designed for next-generation professionals who have, or expect to have positions of trust in their family business, family office, entrepreneurial endeavor, or other family entities such as foundation, family council, shareholder council.

Positions of trust could include – but are not limited to – managerial roles and C-suite, board membership, specialist positions, or other decision-making roles representing ownership. Participants in the program typically come from various backgrounds and no age limitations exist. Please note that, on average, program participants are in their 30s, with an approximate age range of 25 to 45.

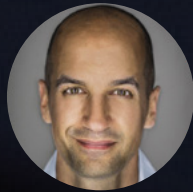
Program focus

The principal objective of the program is to develop decision-makers who are ready for the future. Program participants explore various emerging technologies – such as AI, blockchain, metaverse, and the Internet of Things – and examine how to drive innovation within their family-linked entities to create new opportunities and stay ahead of the curve in their industries.

Furthermore, the program focuses on finding balance between family ownership and leadership while developing a strategic mindset, building business acumen and navigating transformation amidst disruption.

For information on registration, program fees, cancellation policy and terms and conditions please contact Alexander Seehaus at **alexander.seehaus@de.ey.com** or +49 160 939 12852.

Speakers



Intro to exponential thinking **Pascal Finette**

Pascal Finette is CEO at beradical and chair of EY's Wavespace Advisory Board. He founded a series of technology startups, led eBay's Platform Solutions Group in Europe, launched a consulting firm helping entrepreneurs with their strategy & operations, and invested into early-stage tech startups. Pascal led Mozilla's Open Innovation Lab. As Principal at Google.org, he invested into social impact organizations globally.

He founded the non-profit organizations Mentor for Good and The Coaching Fellowship. Pascal loves to work with changemakers who want to, and can, make things better.

IN THIS SESSION

In a tech-driven world and business environment of accelerating change and increasing complexity, the ability to see and think like a futurist offers a growing strategic advantage. But "embracing the future" in business has too often meant succumbing to endless hype cycles, techno babble and wishful thinking. Pascal combines principles and practices from the worlds of strategic foresight, social entrepreneurship, tech innovation, and design to create a unique introduction to envisioning the future and learning how to seize it.



The future of AI and quantum **Dr. Michael Housman**

Michael Housman has 15 years of experience leading technology teams and architecting artificial intelligence platforms that have transformed the way we hire (Evolv), communicate (RapportBoost.AI), detect fraud (Point Predictive) and transact real estate (Doma). He has published his work in a variety of peer-reviewed journals, presented at dozens of academic and practitioner-oriented conferences, and has had his research profiled by such media outlets as The New York Times, Wall Street Journal, The Economist, and The Atlantic. Dr. Housman received his AM and PhD in Applied Economics and Managerial Science from The Wharton School of the University of Pennsylvania and his AB from Harvard University.

IN THIS SESSION

The recent explosion of artificial intelligence technologies is disrupting entire industries and will completely transform the way we live. In this session, Dr. Michael Housman offers up some insight into why the explosion in artificial intelligence is occurring now, how you can best position your organization to harness the power of these advances, and what the future looks like for the fields of computer vision, natural language understanding and generation, and cognitive computing.



Thriving in uncertainty **Dan Klein**

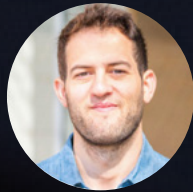
Dan Klein is an Improviser. As a Lecturer of Management at the Stanford Graduate School of Business, a Lecturer in the Department of Theater and an Instructor at the Stanford School, Dan teaches classes on Improvisation, Storytelling, Design Thinking and Acting With Power.

Dan has also taught for IMD in Switzerland, IPADE in Mexico, Te Hono in New Zealand, Enterprise Singapore, and travels around the world (sometimes virtually) delivering keynotes and giving workshops for dozens of companies including Google, Netflix, Blackrock, Nestle and Lucasfilm.

IN THIS SESSION

Today's leaders must possess more tools than critical thinking and logical reasoning. They must also be agile, imaginative, resourceful, and resilient, fostering a Growth Mindset and Psychological Safety for themselves and their teams. Utilize the improvisor's toolset to manage uncertainty in an era of disruptive tech.

Speakers



Metaverse
Aaron Frank

Aaron Frank is a researcher, writer, and consultant who has spent a decade working in Silicon Valley, where he most recently served as Principal Faculty at Singularity University. As a writer, his articles have appeared in *Vice*, *Wired UK*, *Forbes*, and *Venturebeat*.

He routinely advises large companies, startups, and government organizations on trends related to augmented & virtual reality and the use of virtual environments. He's advised clients including Twitter, FC Barcelona, Deloitte and many others.

IN THIS SESSION

As the development of online virtual environments and the formation of virtual economies are shaping the modern internet, the attention is focused on a concept referred to as the "metaverse." But what does that word even mean? Grounded in his decade of work researching, using, and building online virtual environments, Aaron Frank will introduce important context for navigating the hype surrounding this "fancy new tech obsession". This presentation weaves together introductory topics ranging from augmented and virtual reality, game engines, virtual worlds, NFTs, and virtual economies.



AI & Big Data in Healthcare
Raymond McCauley

Raymond McCauley is a scientist, engineer, inventor, investor, and entrepreneur working at the forefront of biotechnology. He explores how applying technology to life is affecting us all using storytelling to show how quickly these changes are happening and where it may head tomorrow. His work and profile have been featured in *Wired*, *Forbes*, *Time*, *CNBC*, *Science*, and *Nature*. Raymond is Principal of Exponential Biosciences; a theme advisor to ARK Invest; Co-founder and Chief Architect for BioCurious and part of the team that developed next generation DNA sequencing at Illumina (SILMN). Raymond creates, advises, invests in, and develops biotech-related startups.

IN THIS SESSION

Medicine has largely resisted digital disruption up until now. But it's a new world, where machine learning and genetic technologies are becoming tools in clinics, big-data-driven approaches to prevention are saving lives and redefining aging, and wearable biosensors are everywhere. Are we ready for Big Brother with a stethoscope? What does this mean for people in the business of healthcare? Not just health systems, but also governments, insurance, financial advisors, and each of our families and selves.



Future of nutrition
Dr. Tiffany Vora

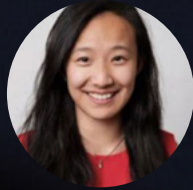
Tiffany J. Vora, PhD, is a Nonresident Fellow of the GeoTech Center of the Atlantic Council and Faculty and Vice Chair of Digital Biology and Medicine at Singularity University. She holds undergraduate degrees in Biology and Chemistry from New York University and a PhD in Molecular Biology from Princeton University.

Dr. Vora serves as an advisor to several companies, is a member of the Homeward Bound Project's sixth cohort of women STEM leaders, and is part of the leadership team of the Space Humanity Lab.

IN THIS SESSION

Exciting advances in exponential technologies and global connectedness are delivering an unprecedented abundance and variety of food around the world. Explore synthetic biology, a dynamic innovation space that views bacteria, yeast, plants, and animals as the "technology" that delivers nutrition (and more). Disruptive new flavors, textures, materials, process components and ways to support health are becoming possible – and are on their way to shelves around the world thanks to precision fermentation, cell-free synthetic biology, and cellular agriculture.

Speakers



The future of finance **Shuo Chen**

Shuo Chen is a General Partner at IOVC, where she focuses on early-stage venture investments in Silicon Valley. She is also Faculty at UC Berkeley. Shuo is appointed by California Governor Gavin Newsom to serve as 1 of 13 voting members on California's Mental Health Commission. In her venture role, Shuo has invested in companies now acquired by Goldman Sachs, Ford, Caterpillar, Binance and Dialpad, and many more. She has helped portfolio company's close deals with Amazon, Apple, Google, Mercedes-Benz and NASA among others. Prior, Shuo worked at Goldman Sachs in investment banking and co-authored one of the leading books on financial regulations.

IN THIS SESSION

Accelerated technological transformations in modern history has caused tremendous challenges as well as great opportunities for financial institutions and banking. It is therefore important to understand how exponential technologies augment and empower the way all companies do business. This talk covers: why AI and blockchain revolutionizes how all businesses transact anything of value; how these technologies have been leveraged by some of the largest financial services companies and most promising startups to bring exponential change to their respective businesses; future opportunities for financial services professionals and organizations from payments and lending to capital markets and asset management leveraging tech.



Strategies for innovation **Pedram Mokrian**

Pedram's career has been focused on architecting innovation and helping shape the application of digital technologies and new business models to transform industries. He is cofounder of Global Innovation Catalyst, and a partner at Ratio Growth. He also serves as faculty at Stanford University and the Haas School of Business at UC Berkeley. He was previously a Principal at Mayfield, one of Silicon Valley's most storied venture capital firms. In addition, he has served as an advisor to a number of start-ups, investment groups, and major corporations including the Texas Medical Center, Vinci, B.Grimm, TOTAL, GE Ventures, EY, MISO, UNICEF, 500 Startups, and others.

IN THIS SESSION

There is an art and a science to adopting a successful, long-term innovation strategy and two common themes that need to be more broadly understood:

- ▶ Consensus kills Innovation: most disruptive opportunities are impeded by the corporate immune system, where the general collective strives to maintain the status-quo.
- ▶ Serendipity is not a strategy: A lack of a focused innovation strategy, structure, and vision is a common inhibitor of driving change.

CONTINUE

Speakers



Lauri Oinaala

Lauri Oinaala is the EY EMEA Family Enterprise Leader and the EY Global Leader for EY NextGen, a platform that serves the next generation of C-suite and board members, with an international membership from 80 countries.

Lauri is an experienced professional in Family Business and Family Office consulting, with a special focus in ownership, family and corporate governance, strategy and transitional advisory related to ownership and leadership.

Prior to joining the EY organization in 2012, Lauri worked within a Nordic family office and its operational entities in Northern Europe and the United States for 10 years, advising the leadership on its growth agenda and projects related to international expansion in Asia-Pacific. Lauri has MSc (Economics and Business Administration) from Aalto University School of Business in Helsinki.

IN THIS SESSION

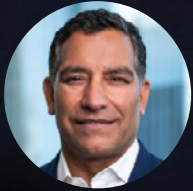
Lauri will run multiple sessions throughout the week and operate alongside Program host Riaz Shah in delivering a cohesive and unique executive learning experience.

Family ownership often brings an additional layer of complexity, and the next generation of leaders face expectations from both the business and the family. Lauri's sessions focus on how future leaders can confidently advance to hold trusted positions within family enterprise and private capital, and bring value to ownership while preparing for a future shaped by innovation and disruption.

The sessions also explore advanced governance topics related to innovation management, and how participants can professionalize their approach to serving in positions of trust, such as boards, refresh the management's thinking and foster a culture of innovation.

CONTINUE

Speakers



Riaz Shah, OBE

Riaz is the EY Global Learning Leader. He has almost 40 years' experience serving clients in both Assurance and Technology Consulting and having various management roles including Assurance MP in London and COO of Markets.

His education is from Bradford University UK (Undergrad), Harvard Business School (AMP180), Singularity University (EP17), and he is a Chartered Accountant. His interests are in technology, education and enterprise. Outside of the EY organization, Riaz is a Founder and Chair of The One Degree Academy, a free school in a disadvantaged area of London. He is also a Professor of Practice for Innovation & Leadership at Hult Ashridge Executive Education in the UK, and he coaches several startup CEOs.

In 2023, Riaz was awarded an OBE (Order of the British Empire) for Services to Education by HM King Charles in the 2023 New Year Honours List.

IN THIS SESSION

Riaz Shah is the Program host and will run daily recaps and reflection discussions as well as the following sessions:

Futures Mapping

In this session, you will use a deceptively simple tool in your group to map out the impact and opportunities of disruptive tech trends. This will then help you better able to foresee future opportunities and emerging threats to your business.

The Future of Work

This session will examine how technology and demographic trends are affecting labor markets around the world, the changing expectations workers, and how we need to be bolder in our responses to these challenges. We will then consider the need for reskilling by governments, employers and individuals.

EY | Building a better working world

EY exists to build a better working world, helping to create long-term value for clients, people and society and build trust in the capital markets.

Enabled by data and technology, diverse EY teams in over 150 countries provide trust through assurance and help clients grow, transform and operate.

Working across assurance, consulting, law, strategy, tax and transactions, EY teams ask better questions to find new answers for the complex issues facing our world today.

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