



Carlyle
Global Partners

'Family Wealth-Holders Charting the Course of Impact Investing & Philanthropy'

*Carlyle Members Forum, Napa Valley, California - an Exclusive, Private Experience
'A Celebration of Family Legacy & Next Gen. Impact'*



Program Highlights - Monday November 18th to Thursday November 21st - Proceeds Benefit Nurse Heroes

Forum at the exclusive Carlyle Estate of Napa Valley - beautiful private estate with breathtaking mountain views.

With Michelin Star Chefs & Award Wining Wineries.

Private tours of legendary Napa Valley vineyards, established by accomplished families as they reveal their mission & legacy in philanthropy.

Art Collection of the Hall Family - A Private Tour.

Black tie gala & concert - at the Four Seasons, Calistoga co-hosted by Carlyle's Napa Valley based Members.

Ensemble performance by select members of the San Francisco Philharmonic Orchestra.

[CarlyleGlobalPartners](http://CarlyleGlobalPartners.com)



Carlyle's Board of Trustees in collaboration with our Napa Valley, California based Members invite you to join an accomplished group of philanthropists for a memorable blend of conversation, music, art, & Michelin Star dining in iconic settings, Monday Nov. 18 to Thursday Nov. 21.

The Carlyle Members Forum Napa Valley, California

For the First Time, the Forum will be hosted at Carlyle's private estate in Calistoga, Napa Valley. The Forum will be memorable blend of conversation, music, art & dining with accomplished philanthropists & family wealth-holders in an iconic setting.



Carlyle Members & guests will have the privilege of visiting legendary Napa Valley vineyards, established by accomplished families & enjoy once-in-a-lifetime private tours & wine tastings.

Gala Hosted at the the iconic Four Seasons of Calistoga, Carlyle Members and guests will have the privilege of a black-tie gala & concert experience on Thursday, November 21st.

Guests will also enjoy a private ensemble performance by select members of the San Francisco Philharmonic Orchestra.

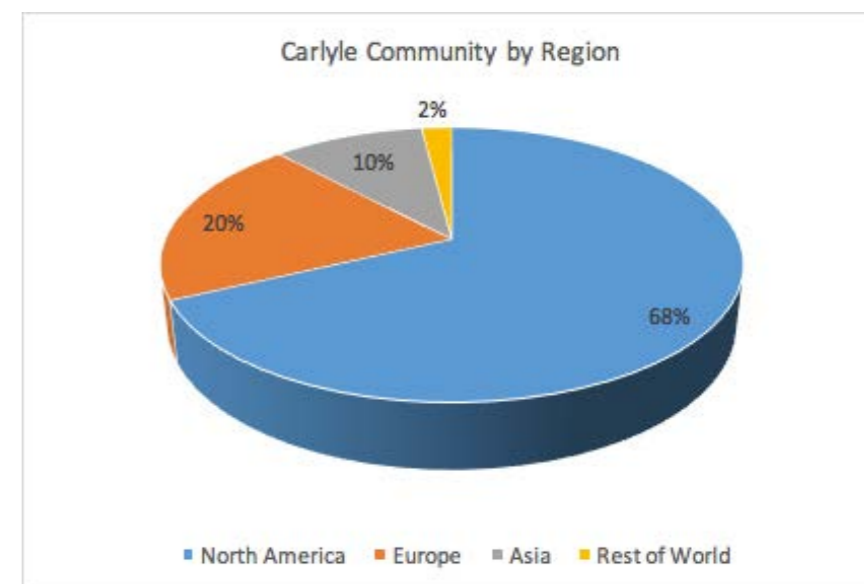
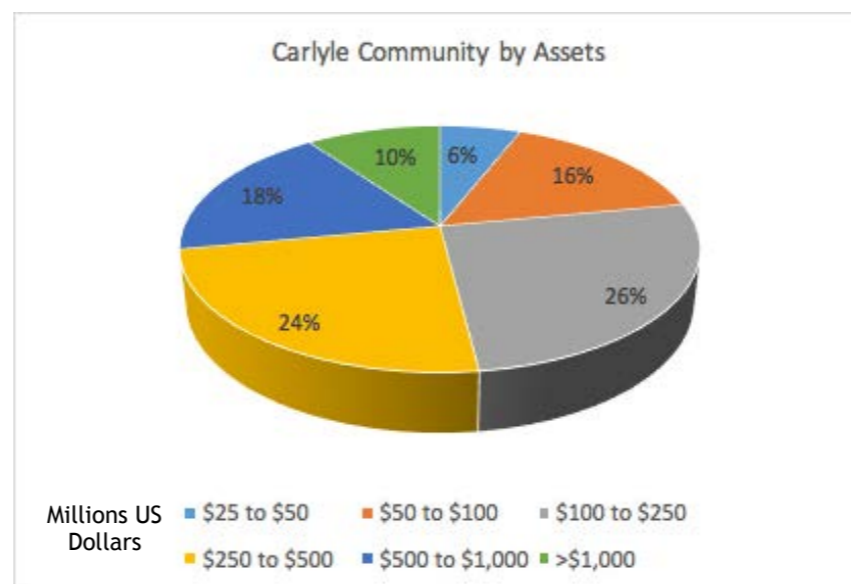
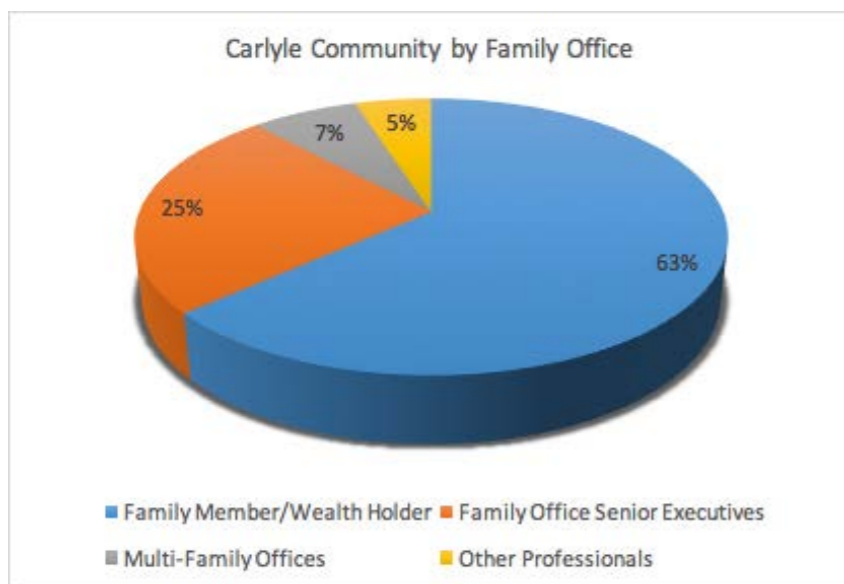




Carlyle Global Partners ('Carlyle') is a by-invitation community of family wealth-holders and sovereign wealth fund peers, built upon trust and connected through common interests for the advancement of knowledge and innovation in areas of national and global importance.

The Carlyle Family Wealth-Holder Community

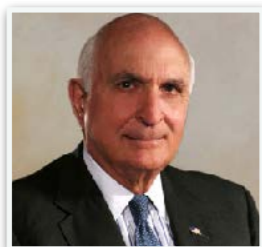
The Carlyle family wealth-holder community includes 250 families & 900 members from around the world, with combined investible assets approaching \$180 billion.



Carlyle provides Members with the specialized resources required to develop knowledge & implement their individual objectives through selective philanthropy & impact investing. Principal areas of focus include health & wellness, sustainability, education, the arts & culture.



Carlyle Forums convene a 'Community of Influence', comprised of accomplished & difficult-to-access philanthropists & innovators who possess the expertise required for transformational impact in areas of national & global importance. Examples of prior participants & co-hosts include:



Mr. Ken Langone, Philanthropist, Co-Founder Home Depot & Chair NYU Langone Board of Trustees



Mr. Kimbal Musk, Board of Directors Tesla, SpaceX, Entrepreneur & Philanthropist



Mr. Jeffrey O. Henley, Vice Chairman of Oracle Corporation & Philanthropist



Ms. Birgitte Hagemann-Snabe, Philanthropist, & Board of Trustees of Hempel Foundation



Mr. Reid Hoffman, Founder LinkedIn, Venture Investor & Philanthropist



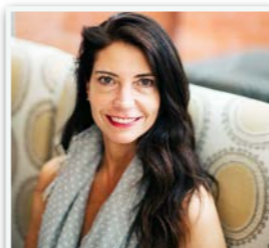
Melani Lowman & Samuel Robson "Rob" Walton, Family Founders of Walmart & Philanthropists



Mr. Leonardo Ferragamo, Chairman Ferragamo Group, Nautor Swan Yachts & Philanthropist



Mr. Robert F. Smith Philanthropist, Chairman Board of Trustees Carnegie Hall, Founder Vista Equity Partners



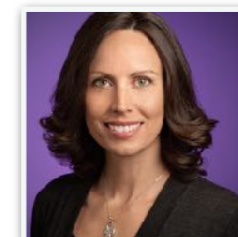
Ms. Julie Maples, Philanthropist, Tech Investor, Board of Directors V Foundation - founders Jim Valvano & ESPN



Ms. Janine Handel, CEO of the Roger Federer Foundation



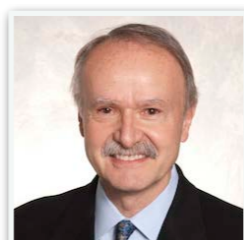
Mr. Khaled Said, Founder Cap Gen Partners & Philanthropist, Family Endowed Oxford University Business School



Ms. Jacqueline Fuller, President The Google Foundation & Philanthropist



Mr. Nico Rosberg, Formula 1 World Champion & Philanthropist



Karoly Nikolich, Ph.D. Venture Partner, Pivotal BioVentures & Philanthropist



Mr. Jeff & Ms. Shari Aronson, Philanthropists & founders Jeffrey H. & Shari L. Aronson Family Foundation



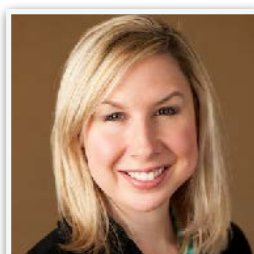
Ambassador Nancy G. Brinker, Philanthropist, Founder Susan G. Komen Race for the Cure



Dr. Ed Bosarge, Philanthropist, Founder of Bosarge Foundation



Mr. Ben Choi, Managing Director Legacy Venture (family office fund-of-funds) & Philanthropist



Ms. Melissa Stevens, Executive Director, Milken Institute Center for Strategic Philanthropy



Mr. Henry McCance, Chairman Emeritus Greylock Partners & Trustee McCance Foundation



Mr. Stephen Kennedy Smith, Board of Directors Kennedy Family Office & Joseph P. Kennedy Foundation



Mr. Walter Robb, Former Co-CEO, Whole Foods (acquired by Amazon) & Philanthropist



Ms. Ellana Lee, Global Head CNN Features, Senior VP CNN International



Mr. Josh Cohen Co-Founder The ImPact, Created with Justin Rockefeller, Steven & Jean Case



The Carlyle Members Forum, Napa Valley: Summary Program, Monday, November 18th to Thursday, November 21st. *'A Celebration of Visionary Family Wealth-Holders Transforming Philanthropy & Innovation.'* Proceeds benefit Nurse Heroes.

Monday November 18th	Tuesday November 19th	Wednesday November 20th	Thursday November 21st
<p>Arrive Calistoga, Napa Valley, California</p>	<p>The Forum & Conversation</p> <p>Hosted at the Carlyle Estate 4409 Silverado Trail North, Calistoga, CA 94515</p> <p><i>Dress Code</i> <i>Sports Jackets or Blazers, no Tie Required</i></p> <p>The Forum Commences 10:00 AM</p> <p>Lunch at the Carlyle Estate 12:30 PM</p>	<p>Morning at Leisure in Napa Valley</p>	<p>10:30 AM Conversation, Private Vineyard Tours & Wine Tastings</p> <p>Hosted at Pritchard Hill, Napa Valley Vineyards</p> <p>Visits to iconic Napa Valley wineries, founded by accomplished families of legendary vineyards in Pritchard Hill.</p> <p><i>Dress Code</i> <i>Sports Jackets or Blazers, no Tie Required.</i></p>
<p>5:00 PM The Forum, Conversation & Cocktails</p> <p>Hosted at Carlyle's Private Calistoga Estate 4409 Silverado Trail North, Calistoga, CA 94515</p>	<p>Forum Continues 2:00 PM</p> <p>Hosted at the Carlyle Estate 4409 Silverado Trail North, Calistoga, CA 94515</p> <p>4:00 PM Forum Concludes</p> <p>Wine Tasting & Conversation</p>	<p>2:00 PM Conversation, Private Vineyard Tour & Wine Tasting</p> <p>Hosted by Mr. David & Ms. Kary Duncan Co-owners Silver Oak Silver Oak 915 Oakville Cross Rd Oakville, CA 94562</p> <p><i>Dress Code</i> <i>Sports Jackets or Blazers, no Tie Required</i></p>	<p>12:30 PM Lunch & Conversation</p> <p>Hosted by Ms. Blakesley & Mr. Cyril Chappallet at Chappallet Winery</p> <p>Chappallet 1581 Sage Canyon Rd. St Helena, CA 94574</p> <p><i>Dress Code</i> <i>Sports Jackets or Blazers, no Tie Required.</i></p>
<p>7:00 PM Welcome Dinner, Cocktail Reception & Conversation</p> <p>Hosted at the Private Residence of Carlyle Member</p> <p><i>Dress Code</i> <i>Sports Jackets or Blazers, no Tie Required</i></p>	<p>7:00 PM Michelin Star Chef & Award Wines Cocktails & Dinner at Carlyle Estate</p> <p>The Carlyle Estate 4409 Silverado Trail North, Calistoga, CA 94515</p> <p><i>Dress Code - Cocktail Attire</i> <i>Jacket or Blazers & Tie, Cocktail Dresses</i></p>	<p>7:00 PM Dinner & Conversation</p> <p>Hosted by Mr. Wes Steffens Co-owner 'Vineyard 7 & 8'</p> <p>Vineyard 7 & 8 4028 Spring Mountain Rd, St Helena, CA 94574</p> <p><i>Dress Code - Cocktail Attire</i> <i>Jacket or Blazers & Tie, Cocktail Dresses</i></p>	<p>7:00 PM Gala & Concert Hosted at The Four Seasons</p> <p>400 Silverado Trail Calistoga, CA 94515</p> <p><i>Dress Code: Black-Tie & Gowns</i></p> <p>Cocktails, Concert Performance & Dinner</p> <p>Special Ensemble Music Performance</p>



We will be joined by members of 'M', the Monaco based by-invitation family wealth-holder organization, together with Mr. Michel Bouquier, founder & Chief Executive Officer of 'M'. We will also be joined by select members of Monaco Ambassadors Club, founded in 1973, (Honorary President, H.S.H. Prince Albert II).

The Carlyle Members Forum Napa Valley, CA. with Members of 'M' & Monaco Ambassadors Club
'A Celebration of Family Legacy & Next Gen. Impact'
Monday, November 18 to Thursday, November 21, 2024

Monaco National Day Celebration: The Carlyle Forum coincides with Monaco National Day, which is celebrated on November 19th every year. In collaboration with members of 'M' and [Monaco Ambassadors Club](#), we will also have a special celebration with our friends joining us from the Principality & in honor of Monaco National Day.



Mr. Michel Bouquier serves as Founder and CEO of 'M', the by-invitation family wealth-holder organization with members representing countries around the world. Members benefit from access to compelling coverings of family wealth-holder peers, hosted by leading institutions around the world, together with resources and relationships in art and philanthropy.

Previously, Mr. Bouquier was the CEO of Monaco Private Label, established on behalf of H.S.H. Prince Albert II in 2009. Monaco Private Label (MPL) is a family wealth-holder organization with over 1,900 members representing over 60 countries around the world. Monaco Private Label Young Leaders (MPL Young Leaders), was created for the benefit of young people under the age of 35, mainly from the families of MPL members. MPL Young Members seeks to serve the interests of the next generation of family wealth-holders.



Commencing at 5:00pm on Monday, Nov. 18th the Forum will be hosted at Carlyle's Calistoga estate for a fireside conversation with accomplished philanthropists, followed by dinner hosted at the private residence of a Carlyle Member.

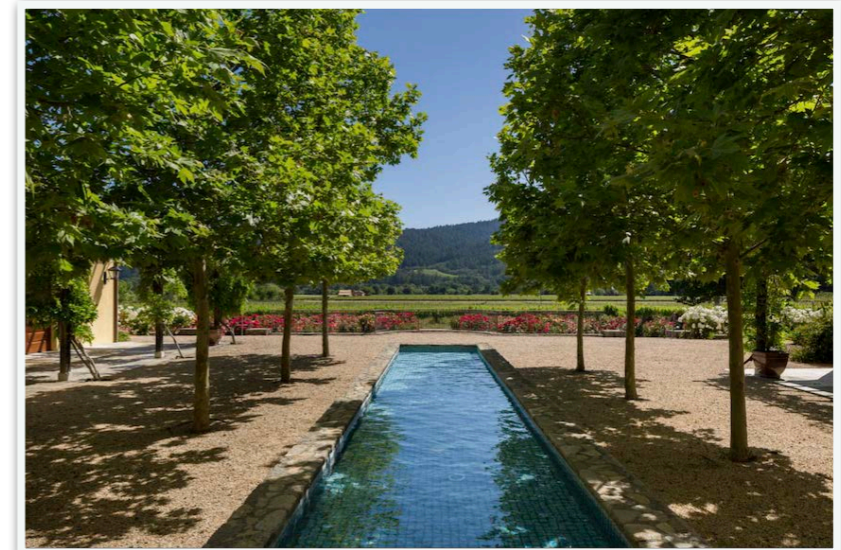
The Forum at Carlyle's Private Napa Valley Estate, Calistoga, CA.

Monday November 18th, 2024

The Carlyle Members Forum, Monday November 18th, commencing at 5:00pm:

Speakers & the Forum experience includes:

- Featuring a 'Fireside Conversation' with Carlyle philanthropists and family wealth-holders.
- Insights to the legacy, mission and accomplishments for positive social impact.
- Followed by cocktails, conversation and dinner hosted at the private residence of Carlyle Member.





On Tuesday November 19th the Forum will be hosted at the Carlyle estate for a blend of conversation & dining with accomplished philanthropists & innovators. The Forum will be followed by dinner set in the estate's beautiful gardens with panoramic mountain views.

The Forum at Carlyle's Private Napa Valley Estate, Calistoga, CA.

Tuesday November 19th, 2024



The Carlyle Members Forum, Tuesday November 19th:

Speakers & the Forum experience includes:

- *'A Celebration of Visionary Family Wealth-Holders Transforming Philanthropy & Innovation.'*
- Carlyle Members & guests attending from the United States & Europe.
- Accomplished philanthropists, Pulitzer Prize Winning Authors & Academy Award Nominated Film Producers.
- Lunch & conversation with Members & guests.





Mr. David Duncan will host Carlyle Members & guests for an afternoon of ‘Conversation & Wine Tasting’ at the family owned *Silver Oak* winery, on Wednesday, November 20th. We will be joined by Duncan family members & friends, who will share insights to their history, their philanthropic mission & legacy.

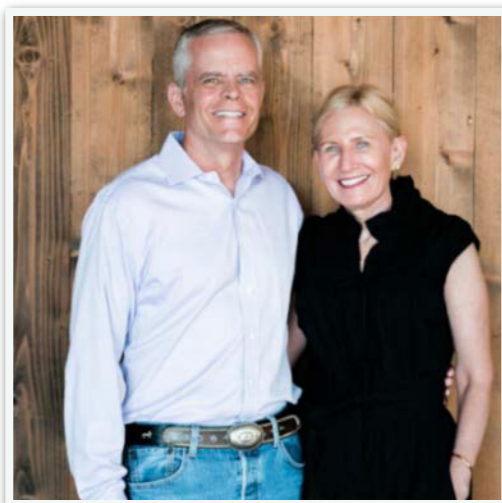
Conversation & Private Wine Tasting

2:00 PM, Wednesday November 20th, 2024

SILVER OAK

For 50 years, Silver Oak has produced delicious, distinctive and food-friendly Cabernet Sauvignon wines from our Napa Valley and Alexander Valley wineries. The Duncan family own four iconic, award-winning wineries including Silver Oak, Ovid, Twomey, and Timeless Napa Valley.

It’s a rare day that you find David Duncan, family owner of Silver Oak, Twomey, OVID Napa Valley and Timeless Napa Valley, sitting in his office. Instead, you’ll likely spot him between vineyard rows, sporting a hard hat at a winery construction site, or chatting with customers at the tasting room bar.



Mr. David & Ms. Kary Duncan

Coupled with his characteristic approachability and good humor, David’s hands-on commitment to continuous improvement has fueled the evolution of the Family of Silver Oak for more than two decades. Even with his hands-on commitment to the Family of Silver Oak, David finds time to be a community leader. A member of the Napa Valley Vintners (NVV) Board of Directors from 2014 to 2022, and co-chaired Auction Napa Valley in 2014. He served as a board member and past Chairman of the St. Helena Hospital Foundation; in 2016, and was co-chair of the Capital Campaign for the St. Helena Montessori School.



Mr. Wes Steffens will host Carlyle Members & guests at 'Vineyard 7 & 8' for dinner, fine wines & panoramic views of Napa Valley at the Steffens family owned estate, in the evening of Wednesday, November 20th. Wes will also share insights to the estate's history and mission in philanthropy.

Dinner, Conversation & Panoramic Views

7:00 PM, Wednesday November 20th, 2024, (continued)

VINEYARD **7&8** AND EIGHT



Vineyard 7 & 8: After a careful and patient search, the Steffens family concluded their quest with the purchase of a forty-acre vineyard estate atop Spring Mountain.

Planted in the early 1980s with eight acres each of Cabernet Sauvignon and Chardonnay, the property met the family's stringent requirements, enabling them to craft wines with a true sense of place.

'Vineyard 7 & 8', named after proprietor Launny Steffens's life in finance, reflecting a theme of numerics & a keen interest in numerology. The number 7 symbolizes luck in Western culture, while 8 signifies prosperity and happiness in Eastern culture.

Vineyard 7 & 8 embodies the family's pursuit of producing fine wines, including Cabernet Sauvignon and Chardonnay, showcasing the unique terroir of their estate.



Mr. Wes Steffens



On Thursday, November 21st Carlyle Members & guests will have the privilege of visiting legendary Pritchard Hill, Napa Valley estates - each established by accomplished families & enjoy private tours, wine tastings & conversation.

Legendary Pritchard Hill, Napa Valley Wineries - Tours & Conversation

Commencing 10:30 AM, Thursday November 21st, 2024 (continued)



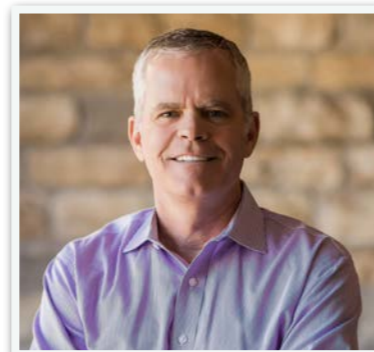
Ms. Laura Long & Mr. David Long



Mr. Scott Becker, Ms. Eden Foley & Mr. Benoit Touquette



Mr. Tim Mondavi & Ms. Marcia Mondavi Borger



Mr. David Duncan



Mr. Tim Duncan



Ms. Blakesley & Mr. Cyril Chappellet will host Carlyle Members & guests for lunch & conversation at the Chappellet Estate. As we experience award-winning wines & breathtaking views, Blakesley & Cyril will also share insights to the estate's history and their mission in philanthropy.

Lunch & Conversation at Chappellet

12:30 PM Thursday November 21st, 2024, (continued)

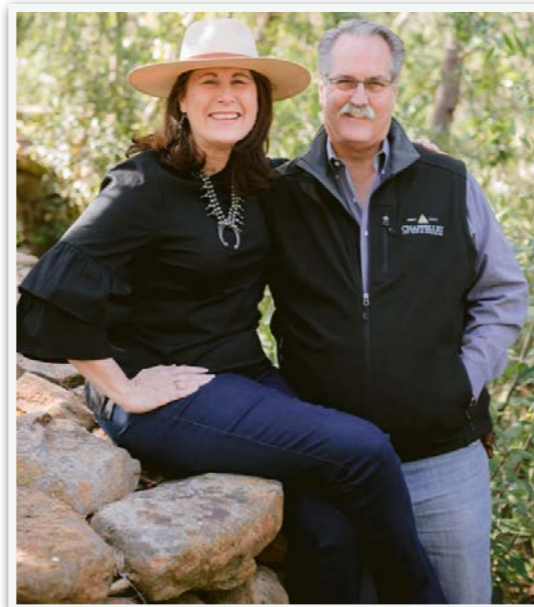


CHAPPELLET

Chappellet is recognized as one of the great Napa Valley wineries, and one of the few which remains family owned. Today, the second generation is committed to continuing the vision of their parents, Donn and Molly Chappellet.

Together, the siblings are dedicated to maintaining sustainable farming techniques, a relentless focus on wine quality, respect for Pritchard Hill's natural beauty and the preservation of family ownership for generations to come.

Blakesley and Cyril are purposeful philanthropists, having supported the V Foundation's signature charity wine auction, and other notable foundations benefiting initiatives in Napa Valley, across the US and internationally.



Ms. Blakesley & Mr. Cyril Chappellet

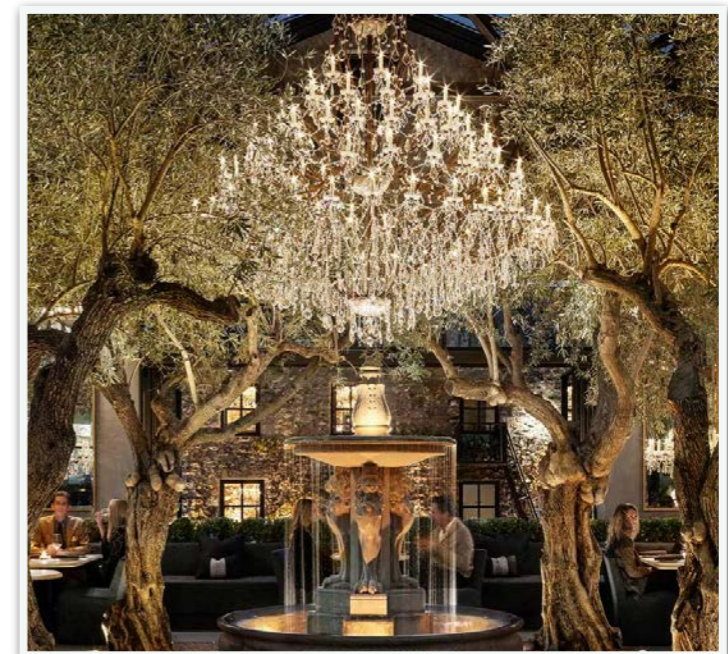




Our gala & concert experience will be hosted at the the legendary Four Seasons of Calistoga, on Thursday November 21st, set against the stunning backdrop of the Palisades Mountains. Guests will have the privilege of enjoying a menu created by our Michelin Star chef, paired with award winning wines.

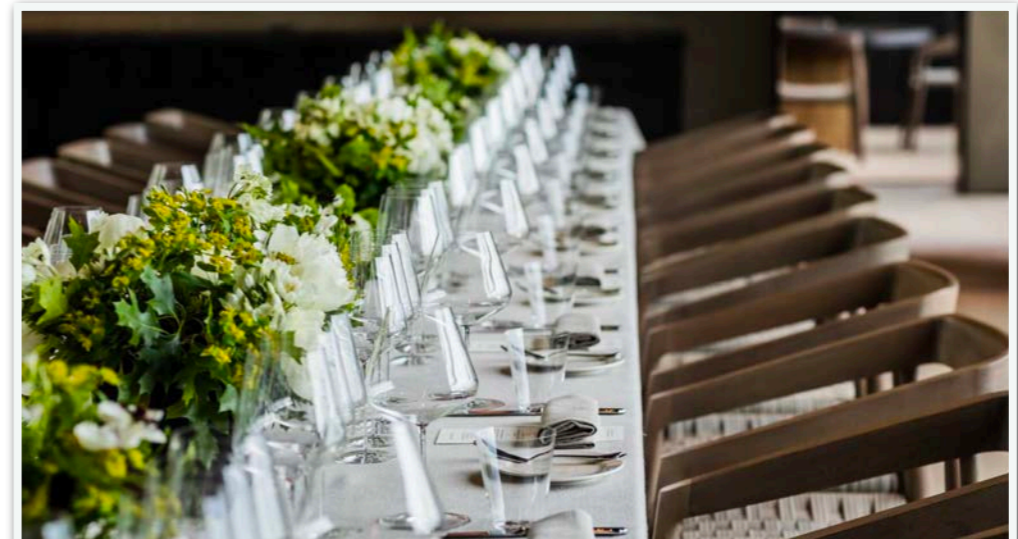
Gala & Concert, the Four Seasons, Calistoga, CA.

7:00 PM, Thursday November 21st, 2024



Gala Concert, Dinner & Conversation :

- **An exclusive experience** of the the Four Seasons, Calistoga.
- **Stunning backdrop** of the Palisades Mountains.
- **Champagne reception** & concert performance, followed by dinner.
- **With Michelin Star Chef** & award wining wines.





Carlyle's guests will also enjoy an ensemble concert performance by select members of the San Francisco Philharmonic Orchestra.

Private Ensemble Performance by Members of the San Francisco Philharmonic Orchestra

Thursday November 21st, 2024, (continued)

