

2027 RIA Salon Series

A long-term, curated RIA relationship partnership — private dinners, thoughtful dialogue and editorial that carries the conversation forward.

PREPARED FOR

Craig Starr, Samuel Agoglia and team

Four dinners · Las Vegas, Miami, Jacksonville / Ponte Vedra and Tri-State / NYC

THE PARTNERSHIP

Small rooms. Lasting relationships.

Modern American Advisor proposes a series of private dinners aligned with Infrastructure Capital Advisors' requested cities and travel windows. The intention is to develop meaningful relationships with relevant RIA owners and investment decision makers over time, rather than treat each evening as a standalone sponsorship.

The average attendance goal is **10-15 highly targeted RIA advisors / decision makers per dinner**, excluding hosts and speakers. This is a planning goal, not an attendance guarantee.

Each salon combines curated introductions, an intimate dinner, a moderated fireside conversation with Infrastructure Capital leadership and thoughtful relationship follow-up.



01

Curated introductions

Personal outreach to jointly selected RIA owners and investment decision makers. MAA manages RSVPs, guest check-in and thoughtful introductions.

02

An intimate dinner

A considered private setting for a focused group of advisors, with room for genuine conversation and shared perspectives.

03

A fireside exchange

A moderated conversation with Infrastructure Capital leadership.

04

Relationships beyond the room

Thoughtful discussion, relevant one-to-one connections and coordinated relationship follow-up carry the exchange forward.

AUDIENCE & QUALIFICATION

The right people, not simply a larger room

A jointly selected RIA audience

MAA and Infrastructure Capital will select the audience together, prioritizing RIA owners and investment decision makers with relevant authority, firm fit and Infrastructure Capital-approved criteria. AUM informs qualification; it is not the sole basis for selection.

Jacksonville feasibility

Kathryn reports 170+ advisor / owner prospects identified with a minimum \$500M AUM, with further segmentation possible. This is internally supplied prospect intelligence, not independently verified research or a count of confirmed attendees. During qualification, we will confirm whether the reported AUM is firm-level and assess fit against the jointly agreed criteria.

PROPOSED 2027 CALENDAR

Built around your travel windows

These are requested travel windows, not booked event dates. Final dinner dates, locations, and venues will be coordinated jointly.

01	Las Vegas February 22-26, 2027 PROPOSED SERIES DINNER	Dinner date and private venue to be coordinated within the travel window.
02	Miami March 15-18, 2027 PROPOSED SERIES DINNER	March 16 is likely unavailable due to Craig’s existing FP dinner commitment. Final date to be coordinated.
03	Jacksonville / Ponte Vedra March 22-26, 2027 PROPOSED SERIES DINNER	Location and dinner date to be selected around audience fit and travel plans.
04	Tri-State / NYC April 2027 · exact date TBD PROPOSED SERIES DINNER	Proposed dinner in NY, NJ or CT, including NYC. Exact city and date TBD.

THE CORE PACKAGE

Four dinners, four managed deliverables

Each proposed dinner pairs the experience described above — curated room, intimate setting, moderated fireside conversation and relationship follow-up — with four deliverables Modern American Advisor develops and manages:

01 · CORE DELIVERABLE

Curated advisor invitations

Modern American Advisor develops and manages invitations to a mutually approved RIA audience, including RSVP coordination and appropriate follow-up.

Invitations, registrations and confirmed attendees are reported separately. All guest contact details — names, firm affiliations and email addresses collected through RSVPs — will be supplied to Infrastructure Capital.

02 · CORE DELIVERABLE

Marketing campaign

A co-branded marketing campaign focused solely on Infrastructure Capital and what the firm offers — its people, approach and capabilities — anchored by a dedicated email to 10,000 independent RIAs, and extended across LinkedIn, Instagram and a dedicated Infrastructure Capital presence on the Modern American Advisor website, with clear branding and a relevant call to action.

The campaign content is solely about Infrastructure Capital. Timing, channels and cadence are finalized in the agreement.

03 · CORE DELIVERABLE

Column series

A featured editorial column in which Jay writes for the Modern American Advisor audience — sharing the perspective, market questions and thinking behind the fireside conversation. Should Infrastructure Capital become a strategic salon series partner, the firm will receive a dedicated column in each magazine.

Subject to editorial review, factual approval where appropriate and applicable financial advertising disclosures. Frequency and exact placements are specified in the agreement.

Message recap editorial

A recap of the message Jay delivered at the dinner, published as an editorial piece and pushed out across all Modern American Advisor social channels. The piece is also provided to Infrastructure Capital for use on the firm's own channels.

Distributed post-event, subject to editorial review and the speaker's sign-off on the delivered remarks. This post-event piece is the client-ready editorial collateral for each dinner — not a separate deliverable.

VALUE ADDED · INCLUDED IN THE SERIES

Extend the value of every conversation

or

Full-page ad in three magazines

Included as added value in your program

Infrastructure Capital receives a full-page ad in each of 3 magazines as part of the proposed series package.

EXAMPLE CONCEPTS

Distinctive settings. One intimate format.

Editorial sketches, not bookings. Each concept is designed around an intimate 10-15 advisor discussion and is

subject to availability, suitable private-room capacity, venue permission, costs and joint approval.

Jacksonville / Ponte Vedra

ILLUSTRATIVE CONCEPT

The Brumos Collection

A private collection experience paired with a curated dinner: a proposed bespoke format that offers a distinctive starting point for an intimate advisor discussion. Executive Circle access is described for meetings and private parties; dinner, catering and tours would need venue confirmation.

Venue reference

ILLUSTRATIVE CONCEPT

TPC Sawgrass

A clubhouse private dinner and moderated conversation, using a shared interest in the setting to bring a small RIA group together. A suitable private room must be confirmed; an optional golf element would be subject to separate costs and scheduling.

Venue reference Venue reference

ILLUSTRATIVE CONCEPT

Waterfront / private yacht-club dinner

An exploratory waterfront dinner with an understated coastal setting and a quiet room for 10-15 advisor participants. No specific venue or yacht-club access is secured; the location would be selected around audience geography and discussion suitability.

Exploratory setting · Venue TBD

ILLUSTRATIVE CONCEPT

Opening Night — Jumbo Shrimp Private Suite

Proposed premium suite hospitality at VyStar Ballpark for 10–15 targeted RIA guests plus hosts, with catered food, curated introductions and a brief pregame discussion with Infrastructure Capital leadership, followed by relaxed relationship-building over the game. The official suite offering includes air-conditioned indoor space, a balcony and catering options. Subject to suite availability, game time, catering and suitable quiet pregame discussion arrangements; no suite is reserved or confirmed.

Planning note: The official 2027 schedule confirms the home opener versus the Charlotte Knights on Friday, March 26, 2027, within the March 22–26 travel window. Game times were not announced in that release.

[Venue reference](#) [Official 2027 schedule](#)

Las Vegas

ILLUSTRATIVE CONCEPT

Zero Bond at Wynn

A members-club salon dinner proposed as a discreet setting for a focused RIA exchange. Subject to membership/access arrangements and club approval; membership does not automatically confer hosting rights. Guest rules and room suitability would be confirmed.

[Venue reference](#) [Venue reference](#)

ILLUSTRATIVE CONCEPT

Delilah at Wynn

A private-dining, supper-club-inspired evening, with an acoustically separate private space prioritized for the moderated discussion. The concept is about conversation and atmosphere, not a promise of entertainment or room capacity.

[Venue reference](#) [Venue reference](#)

ILLUSTRATIVE CONCEPT

Zero Bond NYC

A private members-club salon for a small group of RIA decision makers, designed around a thoughtful dinner conversation. Access arrangements, guest rules and a room suitable for the group and moderated exchange would need confirmation.

Venue reference

ILLUSTRATIVE CONCEPT

Cipriani private executive dinner

A classic, intimate private-dining concept, with the exact property and room selected around advisor geography across NY, NJ and CT. Private-dining or event bookings are distinct from any members-club access; the chosen room must suit the discussion.

Venue reference

ILLUSTRATIVE CONCEPT

The Polo Bar — Ralph Lauren

A sophisticated, intimate hosted dinner, proposed as a private/group arrangement for 10–15 RIA attendees plus hosts. A considered setting for curated introductions and thoughtful conversation, subject to restaurant approval, suitable room/seating, availability and costs; private-room capacity is not confirmed.

Planning note: Official listings place The Polo Bar at 1 East 55th Street. Reports describe a possible move to 625 Madison Avenue; expected tower completion in summer 2029 is not a confirmed restaurant opening date. No confirmed closing/reopening date was located as of October 12, 2026. April 2027 feasibility must be confirmed directly.

Venue reference Venue reference Relocation report · WSJ Relocation report · Grub Street

ILLUSTRATIVE CONCEPT

The Moore — An Artful Private-Club Salon

Miami’s closest thematic counterpart to Zero Bond: a private members’ club and event venue in the Design District, where art and hospitality give the evening its character. Proposed welcome cocktails lead into a curated seated dinner, a 20-minute moderated Infrastructure Capital conversation and relaxed peer discussion among 10–15 RIA attendees plus hosts. The Rabbit Hole, an intimate speakeasy with custom artwork and a dedicated bar, is a room to explore—not a confirmed dinner setting.

Planning note: Rabbit Hole is listed for 25 seated in total, including all guests and hosts—not 25 RIAs. Copa’s 14 seats would not accommodate the upper attendance goal plus hosts. Confirm a suitable private space, dinner menu, table configuration, acoustics, costs and club event access directly; event rental does not promise member access. Proposed only; date and availability unconfirmed.

Venue reference Venue reference

ILLUSTRATIVE CONCEPT

Biscayne Bay — A Private Yacht Salon

An illustrative three-hour evening with the Miami skyline as a changing backdrop: a dockside welcome, a short moderated Infrastructure Capital conversation while docked or in a quiet enclosed salon, then a sunset Biscayne Bay cruise with catered seated dinner and curated introductions before returning to the same dock. Miami Yacht Charters is an operator candidate offering corporate dinner cruises with menu, bar and embarkation customization. A vessel would be selected to suit 10–15 RIA guests plus hosts, subject to a tailored quote—not a confirmed fit or booking.

Planning note: Confirm the exact vessel’s authorized guest count including hosts, seated dining layout, enclosed discussion space, boarding accessibility, weather alternative and full cost quote. Timing and route are illustrative, subject to operator approval and conditions. Advertised guest ranges do not confirm seated dining capacity or our booking minimum; a dockside-only version is an option only if the operator permits.

Venue reference

ILLUSTRATIVE CONCEPT

Cipriani Downtown Miami — The Venetian Table

Classic continuity with the NYC Cipriani concept: Italian hospitality in a restaurant at 465 Brickell Avenue, known for Biscayne Bay views and nautical interiors. A proposed welcome reception flows into a multi-course Italian dinner and moderated conversation at one curated table in a privately reserved setting for 10–15 RIA attendees plus hosts. The Venetian room is the private-event space to explore, with an intimate configuration requested for our group rather than a large-room feel.

Planning note: The Venetian room is listed for 80 seated, larger than our group; confirm table configuration, appropriate minimum spend, private booking, costs and room approval. Bay views from this room are not confirmed. This is Cipriani Downtown Miami restaurant, not the Casa Cipriani members' club. Proposed only; no reservation is confirmed.

Venue reference

Source note: linked official venue pages describe venue offerings; the Jumbo Shrimp schedule release confirms the opening-night date and opponent. Polo Bar relocation reports are press reporting, not confirmed restaurant timing. The salon formats, dinner pairings and discussion experiences above are MAA proposal concepts, not venue-confirmed offers. Links do not establish availability, secured access, agreed catering, suitable room capacity or approval; those details must be confirmed directly.

A shared brief, a coordinated delivery

Modern American Advisor

- Advisor curation, qualification, personal outreach and RSVP coordination
- Event concepts, venue coordination and program design
- Guest check-in, facilitated introductions and conversation moderation
- Co-branded marketing campaign — dedicated email to 10,000 independent RIAs, LinkedIn and Instagram support and a dedicated website presence
- Jay's column series and per-event message recap editorials; a full-page ad in three magazines
- Attendee contact handover and coordinated relationship follow-up

MAA staff handle check-in and introductions; dinner seating is not their responsibility.

Infrastructure Capital Advisors

- Joint approval of audience criteria, qualified guest lists and discussion topics
- Infrastructure Capital leadership participation in the fireside conversation
- Brand assets, firm-specific factual review and required disclosures
- Editorial review, factual approval and speaker sign-off before publication
- Joint confirmation of dates, venues, hospitality budgets and series terms
- Relationship follow-up with relevant advisors

COMMERCIAL PROPOSAL

Four dinners. One series.

Las Vegas	\$15,000
Miami	\$15,000
Jacksonville / Ponte Vedra	\$15,000
Tri-State / NYC	\$15,000
Total dinner series	\$60,000

Added value: Full-page ad in three magazines – included

Dinner / hospitality costs are billed separately. Dates, venues, budgets and payment terms remain subject to final agreement.

NEXT STEPS

Shape the series together

Confirm preferred dinner dates across all four cities, align on advisor criteria and leadership availability, then select suitable venues and finalize the series terms, hospitality budgets and proposed deliverables. The exact Tri-State city and April 2027 date remain to be agreed.