



Societal Impact of AI

CONFERENCE

MARCH 16- 17, 2026
SAN DIEGO, CALIFORNIA

Survival, Sovereignty, and Stewardship

We honor lineage by advancing legacy.

Our Purpose

From a Gathering to a Movement

A conference experience that transcends the transactional to create transformative legacy.

Over the past five years, a growing number of organizations—including our Stanford Engineering Disruptive Technology Program—have convened conferences tailored for family offices. Since COVID, they've exploded, with hundreds of events hosted across the US alone and countless more emerging globally.

Rarely, however, do these forums provide a lasting framework for educating and equipping the next generation with the tools needed to navigate this increasingly complex world. The prospects for AI raise the stakes considerably.

\$84T

Great Wealth
Transfer underway
through 2045

3X

More family offices
leveraging AI in 2025 vs.
2024

\$332B

Expected AI data center
capex growth through
2025

Our Purpose

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What is needed is a sustainable platform—one that goes beyond annual events—designed as a living ecosystem to empower family enterprises to leverage this catapulting technology. Such a platform must be rooted in trust — trust that can only be earned by peer-vetted, values-aligned experts capable of validating the relevant science, triangulating for agreed upon insights, and translating complexity into decisive metrics and concrete proposals.

In today’s highly polarized climate, such an intelligence engine is essential in helping elite families properly crystalize awareness and guide strategic investment toward three societally defining imperatives — geopolitical vigilance (both for national sovereignty and personal security), environmental stewardship, and the family as foundational to democratic ideals.

Whether the political winds blow blue or red, these priorities endure. Success, therefore, must be defined by the platform’s ability to deliver measurable strategic value: a place where every stakeholder finds clarity, conviction, and competitive advantage.

In that spirit, we are proud to announce the launch of the **Alliance for Societal Impact (“ASI”)** –a purpose-built collaboration uniting elite, legacy-minded family enterprises, distinguished faculty from leading engineering and business schools, and thought leaders in family systems and dynamics. ASI operates as an independent entity, unaffiliated with any university administration or formal program, choosing instead to partner directly with pioneering PhDs and researchers at the forefront of technological and societal innovation.

Alliance for Societal Impact

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Our mission: to provide a trusted ecosystem, rooted in discretion, wisdom, and shared purpose, that helps elite families navigate AI's complexity, safeguards what matters most, and shapes lasting legacy.

Our vision: to deliver a new standard of legacy stewardship. A platform for both architects and inheritors of the Great Wealth Transfer¹ designed not merely to help families of outsized wealth make a noble Pledge², but to act: to give, govern, guide, and galvanize in a world of accelerating complexity.

¹ The Great Wealth Transfer in 3 Charts

² The Giving Pledge at 15 - Institute for Policy Studies

The impetus behind ASI traces back to our 2022 Stanford Family Office Summit, a pioneering forum that elevated civil and family sustainability alongside environmental urgency. It focused more on the “family” than the “office,” spotlighting multigenerational leadership as the most effective force to confront these global challenges. Of over 200 participants, nearly 40% were next gens, more than half hailing from outside the US. Their separately curated retreat culminated in a heartfelt manifesto, now preserved in a rich digital archive of full conference content and testimonials that attest to the summit's enduring impact. ASI will echo this legacy—mobilizing next-gen insight to shape a values-driven AI framework.

01 Legacy is not what you leave behind; it's what you build forward.

02 Employing AI and disruptive tech for societal flourishing; not just market gain.

03 A self-reinforcing ecosystem of trust requires visionary families, elite scholars, and principled experts.

04 Anchor decisions in principle, not partisanship - *What's right* must prevail over *Who's right*.

05 Honor thy father and mother by honoring thy son and thy daughter.

The March 2026 Conference

MARCH 16 - 17, 2026

Societal Impact of AI

Human Survival, Sovereignty, and Stewardship
Mobilizing Values-Driven Intelligence to Solve Family
Enterprise Leaders' Hardest Problems

Our mission: to provide a trusted ecosystem, rooted in discOn March 16–17, 2026, The Alliance for Societal Impact (“ASI”) will convene in San Diego for their inaugural conference: “AI for Human Survival, Sovereignty, and Stewardship.” This invitation-only gathering will convene legacy stewards and next-generation leaders from elite families alongside faculty from world-renowned institutions—including Stanford, MIT, Wharton, Harvard, Columbia, and UC San Diego. Joining them will be senior executives from leading technology, AI, and venture capital firms, as well as geopolitical strategists and systems thinkers.

These thought leaders embody a rare blend: humble enough to honor the wisdom of past generations, expert enough to equip the next generation to steward through complexity. All view artificial intelligence not merely as a tool, but as a transformative force.

When guided by principled stewardship, AI can safeguard generational wealth, strengthen enduring family systems, and address humanity’s most complex challenges. But this future will not build itself. It requires the next generation of leadership, those who can wield intelligence with integrity and power with purpose.

Our goal is to forge frameworks, alliances, and innovations that do not merely react to crisis but architect enduring solutions to protect what matters most: our families, our freedoms, and our future.

Conference Objectives

Mobilizing values-driven intelligence to solve family enterprise leaders' hardest problems

Make sense of global uncertainty 01

Help family enterprises navigate the compounding uncertainty driven by economic volatility, geopolitical tensions—including U.S.–China decoupling and tariff shifts—and the accelerating influence of AI across every facet of life. We'll examine how these forces are reshaping investment landscapes across key sectors—from re-shoring U.S. manufacturing to national defense, energy, environmental systems, and healthcare—and how families can act with foresight and agility amid the disruption.

Invisible Threats – Intelligent Defense 02

Legacy protection in a digital world demands that elite family security rival that of sovereign heads of state. A discreet team of high-clearance advisors—spanning defense, intelligence, and advanced technology—will unveil battle-tested protocols. Examples include the deployment of dual-use systems (AI technologies with both civilian and military applications), such as autonomous drone surveillance, predictive threat detection, and "zero-trust" architectures, all primed for public-private investment.

Prepare families to thrive together for long-term impact 03

History's most enduring family enterprises intentionally align mission, vision, and values—not just in their business, but within the family itself. Today's visionary families will share how they are redefining net worth as a constellation of financial, spiritual, relational, human, and societal capital—expanding their capacity for purpose, unity, and resilience across generations.

Assure legacy by harnessing AI's "human" ability 04

Explore Digital Twin technology to preserve the wisdom of a family's wealth creator—or its current torchbearers—by capturing both their skill (expertise, insights, decision-making patterns) and their will (values, philosophies, and formative setbacks that shaped resilience). By enveloping these lived experiences, future generations of leaders can avoid costly missteps and continually adapt. A well-designed Digital Twin is more than an archive—it's a true heritage vault, able to engage and respond to queries in the language and educational level of the legacy bearer or business apprentice, ensuring the family pioneer remains tangibly present and interactively engaged across generations.

Facilitate Next Generation leadership collaboration 05

Next Gen leaders will likely be the ones driving AI adoption in their businesses. A guided session on how to identify AI use cases will be developed that leads implementation step by step. To spark cross-generational conversations, rising family leaders will be paired with next-gen engineers to facilitate mutual real-world understanding of the other's challenges and opportunities with the intent of cultivating new ideas, enduring partnerships, and purpose-driven leadership.

Mastering AI, Family by Family 06

Breakout sessions will be developed based on participant surveys to facilitate small-group discussions. Examples of potential topics include intuitive training aids simple enough to engage a child yet powerful enough to guide a dynasty, encrypted Small Language Models secured by bespoke AI architectures invisible to public networks, and the importance of AI-savvy consultants in providing AI as a managed service that is continuously adaptive as AI and quantum capabilities advance.

Curating Posterity and Proscription 07

The full breadth of the conference—talks, panels, and informal exchanges—will utilize AI to create a living repository of insights, intelligently indexed, summarized, and cross-referenced to inform the development of enduring curriculum and engagement frameworks going forward.



Cheryl K. Goodman

CEO & Co-founder of ASI, FindGood.tech & Author, How to Win Friends and Influence Robots

Cheryl Goodman is a C-Suite technology executive, strategist and author who helps organizations convert emerging technologies into ROI. She's led innovation narratives across Fortune 100 companies including Sony and Qualcomm, where she managed a \$100M ESG portfolio, drove global AI and robotics to market. She is a Google certified trainer, and leads hand-on unbiased AI workshops, hack-a-thons and trains boards and executives on practical and applied AI.



Michael Steep

Co-founder & CTO of ASI, Stanford Disruptive Tech Program

Mike Steep has been at the forefront of technology for the last 30 years. He is the author of the newly released book "First Light of Day: A Cautionary Tale of Our Future," and the founder and executive director of Stanford University School of Engineering's Disruptive Technology and Digital Cities Program.



Lonnie Gienger

CEO, Wilkinson Corp. & Author of Beyond Business: How Your Company Can Build a Better World

Lonnie has spent four decades building high-performing businesses with billions in transactions and industry-leading returns, but his most transformative work began when he committed to leading his family with the same intentionality he brought to his companies.



Robert Bernstein

Founder, Prism Family Office, LLC & Co-founder/Chairman, Guitars Over Guns Organization

Robert is an impassioned ecosystem builder who has spent decades disrupting entrenched industries across money management, finance, advertising, and education. He founded the Stanford Disruptive Technology Program with a core belief that passion-inspired vocation fuels purpose, failure is the stepping stone to flourishing, and network trumps net worth.



Kathleen Tepley

Founder & CEO, LACG: Los Angeles Consulting Group

Kathleen is the Founder & CEO of Los Angeles Consulting Group (LACG), an international business development practice serving family offices, private capital markets, and closely held businesses through strategic networking and curated event production, including the notable Lido Family Office Investment Symposium (2010-2019). She currently serves as Managing Director of the Family Office Association and runs the US initiative for the Global Family Office Community, leveraging her expertise in creating sustainable business connections within the private capital ecosystem.



Jeremiah Baker

Co-founder, Bonin Ventures

Jeremiah Baker has spent 18 years in cybersecurity, helping companies identify security vulnerabilities and defend against cyberattacks, insights he shares globally through his book and keynote series "Confessions of a Hacker." Over two decades, he's consulted with world-class companies including Cisco, HP, and Equifax, been involved in several successful startup exits, and now serves on Stanford University's Board of Advisors