



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

Carlyle Members Forum - New York City - an Exclusive, Private Experience

'A Celebration of Family Legacy & Next Gen. Impact'

Honoring the 250th Anniversary of the Signing of the Declaration of Independence & Founding of America



Program Highlights - Wednesday May 27th to Friday May 29th

Carnegie Hall Hosted Gala, Private Ensemble Concert Performance & Dinner - Once in a Lifetime Experience.

'A Celebration of 250 Years of French-American Friendship', a unique experience hosted by Comité Colbert, featuring over 60 members including Chanel Group, Hermès, Kering Group, LVMH Group, Richemont Group & many more.

The Carlyle Members Forum, featuring family wealth-holders, Pulitzer Prize Winning Authors & philanthropists from the United States & Europe.

Private tour of the iconic Morgan Library & Museum, Madison Avenue, designed by Pritzker Prize-winning architect Renzo Piano.

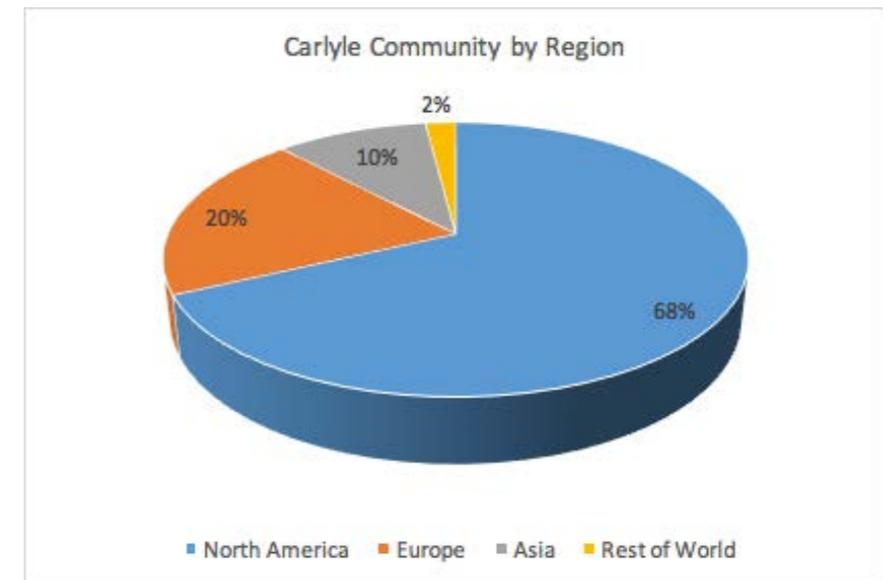
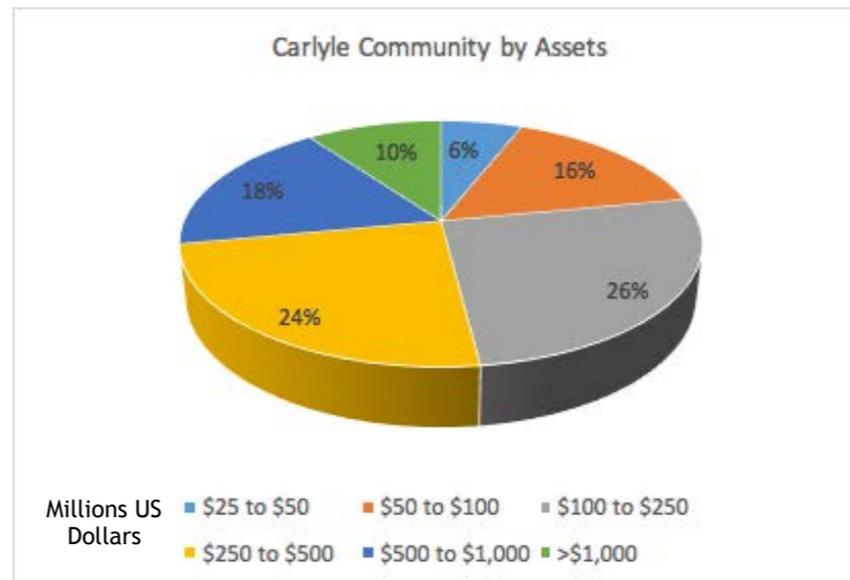
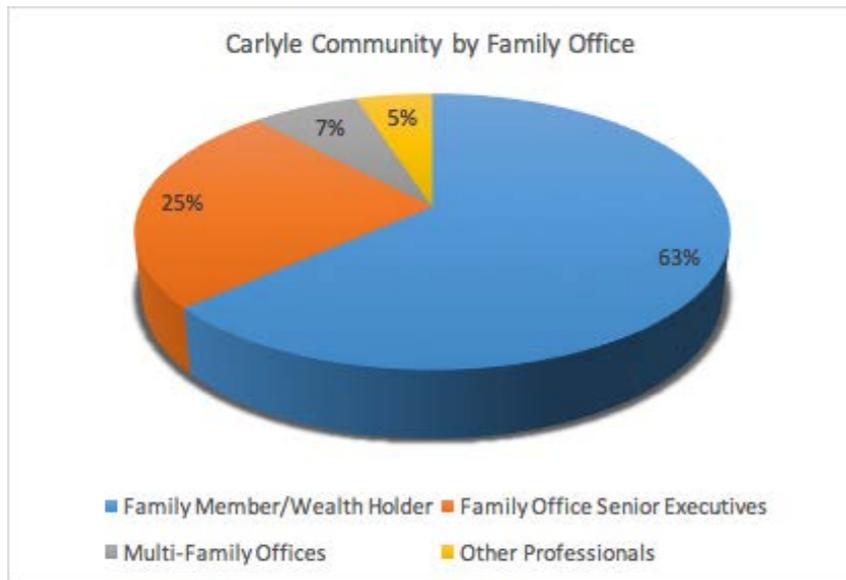
Exciting reveal hosted at the Payne Whitney Mansion of Villa Albertine's Lafayette Fellowship scholarship program, benefiting American students.



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:



H.S.H. Prince Albert II of Monaco



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



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



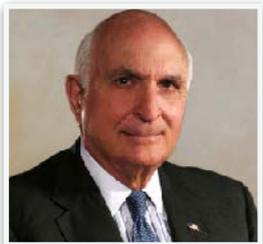
Ms. Birgitte Hagemann-Snabe, Philanthropist, & Board of Trustees of Hempel Foundation



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



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



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



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, founded by ESPN



Ms. Janine Handel, CEO of the Roger Federer Foundation



Mr. David Dolby, founders Dolby Labs, Dolby Family Ventures, & Philanthropist



Ms. Jacqueline Fuller, President The Google Foundation & Philanthropist



Mr. Nico Rosberg, Formula 1 World Champion & Philanthropist



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



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



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



Carlyle, in collaboration with our hosts the University Club, Morgan Library & Museum, Carnegie Hall, French Consulate's Villa Albertine, & Comité Colbert, we will be joined by accomplished family wealth-holders for once-in-a-lifetime experiences at iconic New York venues, Wednesday May 27th to Friday May 29th.

Wednesday May 27th	Thursday May 28th	Friday May 29th
<p>Arrive New York City</p>	<p>10:00 AM The Forum & Conversation</p> <p>Hosted at the University Club 1 W 54th St, & 5th Avenue New York, NY 10019</p> <p>Fireside Conversations & Speakers - insights to how accomplished family wealth-holders are building & preserving family legacy for positive social impact.</p> <p><i>Dress Code</i> <u>Jacket or Blazer, Ties Required by Club, Cocktail Attire for Women</u></p>	<p>10:00 AM The Forum & Conversation</p> <p>Hosted at Villa Albertine 972 5th Ave and 79th Street, New York, NY 10075</p> <p>Fireside Conversations & Speakers - insights to how accomplished family wealth-holders are building & preserving family legacy for positive social impact.</p> <p><i>Recommended Attire</i> <u>Sports Jackets or Blazers, no Tie Required</u></p>
<p>4:00 PM The Forum, Conversation & Cocktails</p> <p>Hosted at The University Club 1 W 54th St, & 5th Avenue New York, NY 10019</p> <p>Fireside Conversations & Speakers - insights to how accomplished family wealth-holders are building & preserving family legacy for positive social impact.</p> <p><i>Dress Code</i> <u>Jacket or Blazer, Ties Required by Club, Cocktail Attire for Women</u></p>	<p>12:30 PM Lunch at the University Club</p> <p>2:00 PM Forum Concludes at the University Club 1 W 54th St, & 5th Avenue New York, NY 10019</p> <p>4:30PM Exhibition Hosted by Comité Colbert & Fireside Conversations The Shed, Hudson Yards 545 West 30th Street New York, NY 10001</p> <p>6:30 PM Exhibition & Forum Concludes</p>	<p>12:30 PM Lunch at Villa Albertine</p> <p>2:00 PM Forum Concludes at Villa Albertine</p> <p>3:00 PM Private Tour of the Morgan Library & Museum Private tour & viewing of collection, our hosts will reveal greatest treasures & stories of the Morgan Library & Museum.</p> <p>225 Madison Ave, at 36th Street New York, NY 10016.</p>
<p>6:00 PM Cocktail Reception, Ensemble Concert by Lichtenstein Group Trust Youth Orchestra & Cocktails</p> <p>Hosted at The University Club 1 W 54th St, & 5th Avenue New York, NY 10019</p> <p><i>Dress Code</i> <u>Jacket or Blazer, Ties Required by Club, Cocktail Attire for Women</u></p>	<p>7:30PM Ensemble Performance, Dinner & Conversation</p> <p>Featuring a memorable ensemble concert performance, featuring US première of music by Academy Award Winning composer Ms. Rachel Portman</p> <p><i>Dress Code</i> <u>Jacket or Blazer, Cocktail Attire for Women</u></p>	<p>7:00 PM Gala Hosted by Carnegie Hall <i>Dress Code: Black-Tie & Gowns</i></p> <p>Cocktails, Ensemble Concert & Dinner</p> <p>Carnegie Hall, 881 7th Ave, New York, NY 10019 Corner of 57th Street and 7th Avenue</p> <p>Ensemble Performance, Oxford Philharmonic Orchestra, & Marios Papadopoulos MBE, Founder & Music Director</p>



In the heart of New York City's Fifth Avenue, the elegant University Club will host the Carlyle Forum on May 27th and May 28th. We will be joined by compelling speakers including accomplished family wealth-holders, philanthropists, and award winning film-makers advancing innovation & knowledge in areas of national global importance.

The Carlyle Members Forum at the University Club

Wednesday May 27th & Thursday May 28th 2026



The University Club, Wednesday, May 27th and Thursday, May 28th:

- Founded in 1861, the University Club is a landmark architectural destination, overlooking Fifth Avenue.
- **Fireside Conversations & Speakers** - insights to how accomplished family wealth-holders are building & preserving family legacy for positive social impact.
- **On May 27th and May 28th** the Forum will be followed by:
 - Special ensemble performance** by select young American & European members of the Lichtenstein Group Trust Youth Orchestra; Hon. Chairman H.S.H. Prince Philipp von und zu Liechtenstein.
 - Cocktails and conversation** in the beautifully preserved lounge of the University Club.



Mr. Alexander Gilman



Ms. Clarissa Bevilacqua



Lyam Chenaux - 'Prodiges' 2025 Winner



We will have the privilege of enjoying 'A Celebration of 250 Years of French-American Friendship' - a unique exhibition hosted by renowned 'Comité Colbert', featuring historic masterpieces & hidden treasures from over 60 members including Chanel Group, Hermès, Kering Group, LVMH Group, Richemont Group & more...



An Exceptional Cultural Exhibition - The Shed, Hudson Yards, NYC

Thursday May 28th, 2026

'Comité Colbert - A Celebration of 250 Years of French-American Friendship'

Founded in 1954, the internationally renowned Comité Colbert members include 97 French luxury Maisons and 18 cultural institutions.

On the occasion of the 250th anniversary of the signing of the Declaration of Independence and founding of America, this unique NYC exhibition creates a 'once-in-a-lifetime experience' with a unique collection of masterpieces, some of which will be exhibited to the public for the first time.



Bénédicte Epinay, President & CEO

"For more than 250 years, French luxury has served our American friends and clients as a language and a cultural lens, shaping aspirations and influencing artistic, diplomatic, and social expression.

This historic exhibition, 'Hidden Treasures, 250 Years of Franco-American Luxury Stories' invites you to rediscover this dialogue as a living force. Diplomatic gifts, transatlantic voyages, couture worn by icons, masterpieces collected by American museums, and collaborations between artists and Maisons all point to a deeper truth: French luxury has long been woven into the American story, its myths, its aesthetics, its ambitions."

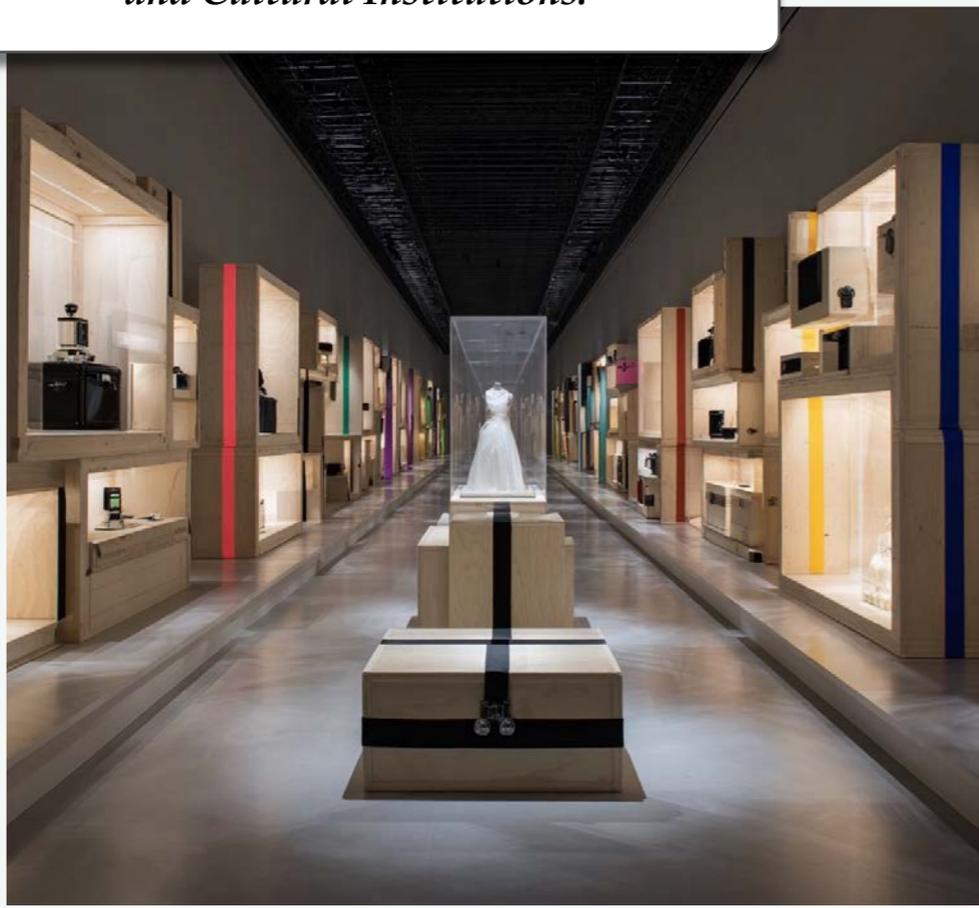


On Thursday May 28th, 2026 Carlyle's family wealth-holders & guests will experience a private-viewing of an historic collection of masterpieces & hidden treasures exhibited by over 60 Comité Colbert members, some of which will be exhibited to the public for the first time.



Examples of Actual Select Exhibits - 'A Celebration of 250 Years of French-American Friendship'

Featuring over 20,000 square feet of exquisite exhibition masterpieces by over 60 Maisons and Cultural Institutions.



The NYC Exhibition



Hermès, the 'Kelly Bag'



Princess Grace, with Hermès 'Kelly Bag', 1956



Givenchy Haute Couture, 1959 & worn by Jacqueline Kennedy during official to Paris June, 1961



President JF Kennedy, President Charles de Gaulle, Jacqueline Kennedy



On Thursday May 28th, 2026 Carlyle's family wealth-holders & guests will experience a private-viewing of an historic collection of masterpieces & hidden treasures exhibited by over 60 Comité Colbert members, some exhibited to the public for the first time, (Continued).



Examples of Actual Select Exhibits - 'A Celebration of 250 Years of French-American Friendship'



The NYC Exhibition



Baccarat, Heritage Clock, 1948 later owned by playwright Arthur Miller & Marilyn Monroe



Cartier, 1969 one of three miniature Apollo 11 Lunar Modules created in tribute to defining moment in American & global history



Boucheron, 1899 Belle Epoque diamond necklace made for Marie-Louise by John Mackay, American silver mining magnate



Cartier presents the masterpieces to Apollo 11 crew - Neil Armstrong, Buzz Aldrin, & Michael Collins



On Thursday May 28th, 2026 Carlyle’s family wealth-holders & guests will experience a private-viewing of an historic collection of masterpieces & hidden treasures exhibited by over 60 Comité Colbert members, some exhibited to the public for the first time, (Continued).



Examples of Actual Select Exhibits - ‘A Celebration of 250 Years of French-American Friendship’



Christian Dior Couture, 1951 ‘Athena’ Evening Gown, part of Christian New York Line. The ‘Athena’ continues to be worn by celebrities attending the Met Gala



Ms. Mona Bismarck, wearing Balenciaga, first American woman to be named “Best-Dressed Woman” in 1933



Balenciaga, 1958 as worn by Ms. Mona Bismarck, above.



LOUIS XIII Time Collection Carafe, 1939, created for the 1939 NYC World Fair



Louis Vuitton, 1907 made for Mr. Louis Comfort Tiffany, designer & maker of exquisite Tiffany glass



Following our privatized exhibition experience, Carlyle Members, together with select members of Comité Colbert, & exhibiting Maisons will enjoy dinner & a memorable ensemble concert performance, featuring US première of music by Academy Award Winning composer Ms. Rachel Portman.

Ensemble Performance, Cocktails, Conversation & Dinner

Thursday May 28th, 2026



*Academy Award Winning
Composer, Ms. Rachel Portman*



Ensemble Performance, Cocktails, Conversation & Dinner - Thursday, May 28th:

- The US première of music by Academy Award Winning composer, Ms. Rachel Portman.
- Ensemble performance by the Lichtenstein Group Trust Youth Orchestra, featuring young American and European artists, CEO & Founder, Mr. Alexander Gilman, Hon. Chairman H.S.H. Prince Philipp von und zu Liechtenstein.
- Special guest appearance & speaker.
- Cocktails, Dinner & Conversation.



The Payne Whitney Mansion, & US headquarters of the French-American cultural programs of Villa Albertine, will host the Carlyle Members Forum on Friday, May 29th. The occasion will also reveal insights to Villa Albertine's Lafayette Fellowship scholarship program, benefiting American students.

The Carlyle Forum, Hosted by Villa Albertine, NYC

10:00 AM Friday May 29th, 2026




**AMBASSADE
DE FRANCE
AUX ÉTATS-UNIS**
*Liberté
Égalité
Fraternité*

The Carlyle Members Forum, at the The Payne Whitney Mansion & Villa Albertine, overlooking Central Park:

- 'A Celebration of Visionary American and French Family Wealth-Holders, Business Leaders and Philanthropists.'
- This memorable occasion will also celebrate the first American recipients of Villa Albertine's Lafayette Fellowship scholarship program, with students receiving fully-funded study at elite Universities in Paris, commencing July 2026.
- Lunch & conversation with Carlyle Members & guests.
- Tour of the cultural treasures of Villa Albertine, NYC.
- Ensemble music performance, including Lyam Chenaux, cellist and overall winner prestigious French TV show 'Prodiges' 2025.



Central Park & NYC Skyline



*Michelangelo
'The Young Archer' Circa 1491*



*'Fallen Tree', Morning Mist Collection
YMER&MALTA/ Benjamin Graindorge 2011*

Villa Albertine, NYC - Cultural Treasures



On Friday May 29th, Carlyle Members & guests will have the privilege of a private tour of the iconic Morgan Library & Museum, Madison Avenue, designed by Pritzker Prize-winning architect Renzo Piano - filled with rare and historically important exhibits, it is also an architectural landmark.

Private Tour of the Morgan Library & Museum

3:00 PM Friday May 29th, 2026

Carlyle Members and guests will enjoy a private guided tour, with access rarely experienced by others:

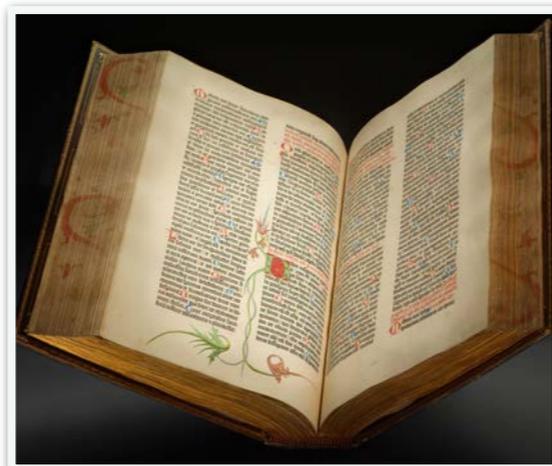
The Morgan Library and Museum began as the private library of J. P. Morgan, one of the most powerful financiers of the late 19th and early 20th centuries. Morgan was not just an accomplished family wealth-holder, he was one of America's greatest collectors of rare books, manuscripts, and art, shaping what we now think of as "cultural philanthropy."

Carlyle Members & guests will see some of the most important literary and historical materials anywhere in the world, including:

- Original manuscripts by **Shakespeare, Jane Austen, Charles Dickens, and Mark Twain**
- Original music manuscripts by **Mozart, Beethoven, and Bach**
- **Gutenberg Bibles**, one of only a few dozen complete copies
- Ancient seals, drawings by **Michelangelo**, and early printed books
- Medieval illuminated manuscripts, sketches and paintings.



The Morgan Library & Museum, Madison Avenue



Gutenberg Bible, Circa 1454



Prayer book of Claude de France, Circa 1517



Auguste Renoir, Circa 1881



Carnegie Hall is our host for our gala experience on Friday May 29, Carlyle, Comité Colbert & Villa Albertine members & guests will enjoy an elegant cocktail reception hosted across the exclusive & beautiful roof-top garden of Carnegie Hall, with views towards Seventh Avenue & Central Park, followed by,...

Carnegie Hall Hosted Gala, Concert and Dinner

'A Celebration of the 250th Anniversary of the Signing of the Declaration of Independence & Founding of America'

7:00 PM Friday May 29th, 2026



Carnegie Hall, Rooftop Terrace & Garden



Historic Carnegie Hall is Host of our Gala & Ensemble Concert Performance:

Opened in 1891, Carnegie Hall has hosted pivotal moments in music history, from Tchaikovsky conducting the opening concerts to Duke Ellington, Yo-Yo Ma and many more.

Carnegie Hall is considered one of the world's most influential concert venues – musically, historically, and symbolically.



...an ensemble concert performance by select members of the Oxford Philharmonic Orchestra. Our concert will take place in the roof-top concert hall which looks out to the lawn with views of 7th Avenue and Central Park, followed by our gala dinner.

Carnegie Hall Hosted Gala, Concert and Dinner

'A Celebration of the 250th Anniversary of the Signing of the Declaration of Independence & Founding of America'

7:00 PM Friday May 29th, 2026



*Marios Papadopoulos MBE,
Founder & Music Director of the
Oxford Philharmonic Orchestra*



Members of Oxford Philharmonic Orchestra



Carnegie Hall, the Weill Music Room, Overlooking the Rooftop Terrace



The Carlyle Global Partners and Carlyle Global Advisors family wealth-holder group leadership:



Mr. Alex Charlton serves as CEO of the Carlyle Global Partners family-wealth holder organization, a by-invitation community, built upon trust and connected through common interests for the advancement of knowledge and innovation through selective investing and philanthropy.

For over 25 years Mr. Charlton has advised leading family wealth-holders and corporate clients advance their individual objectives focused on impact investing and philanthropy. Mr. Charlton has special expertise in the wellness and healthcare sectors, assisting clients with origination and structuring of transactions including strategic planning, due diligence and acquisitions. In philanthropy, he has assisted clients with capital deployment associated with grant-awards and program related investments.

Mr. Charlton also serves on the Board of Directors of for-profit and non-profit organizations. He serves as Chairman of the Board of Directors of Nurse Heroes, as a member of the BoD of Ending Pandemics Academy, the 'Women Who Dared' art collection and the Sphinx Orchestra. Mr. Charlton lives with his family close to New York City.



Dr. Wolfgang Daum serves as CEO of Carlyle Global Advisors and is a serial entrepreneur and investor, working with accomplished family wealth-holders around the world. On behalf of Carlyle Advisors family wealth-holder clients, Dr. Daum specializes in commercializing innovative technology while also securing investment participation by leading institutional investors and strategic corporate investors.

Dr. Daum has special expertise in the wellness and healthcare sectors. He has developed a network of relationships with accomplished family wealth-holders in both the United States and internationally that share a commitment for impact investing particularly in the life sciences, whom he advises on related investments.

Dr. Daum holds a M.S. in Physics from University of Göttingen and a PhD from the Technical University Hamburg-Harburg, both in Germany. He received the Innovation Prize of the German Economy in 1995 and lives with his family on the San Francisco Peninsula.