

09 - 10 JUNE
2027

SAN JOSÉ DEL CABO

B.C.S.

THE FAMILY LEGACY
GATHERING
AND MEXICO'S MOST
AUTHENTIC PRIVATE CAPITAL
NETWORK



Mexico Family Office / Enterprise Summit

CUMBRE LEGACY

BY

PRESTEL AND PARTNER & MESAREY



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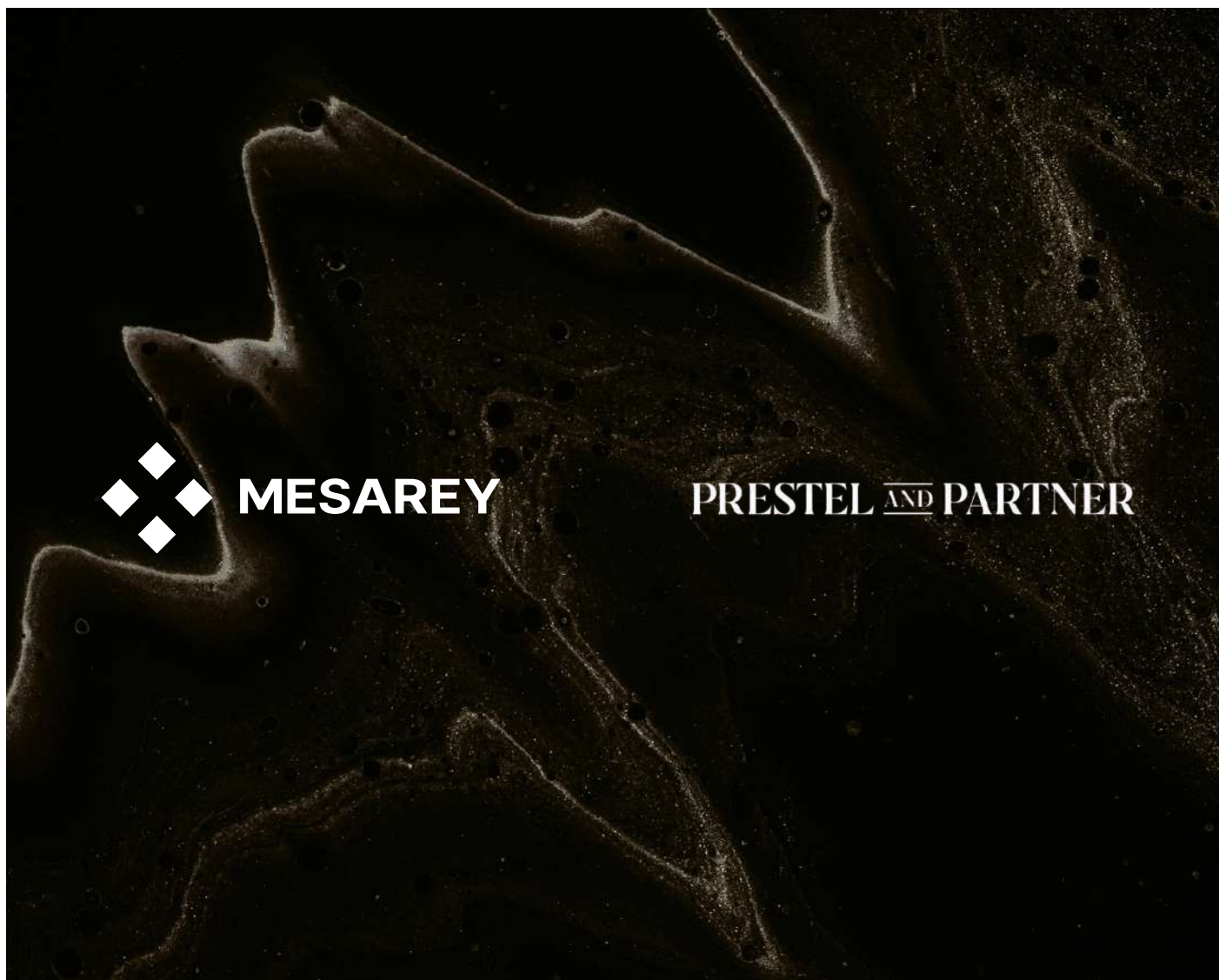
ABOUT CUMBRE LEGACY

Cumbre Legacy is the first platform in Mexico dedicated to bringing together entrepreneurs, legacy families, and new generations around wealth preservation, legacy building, and the evolution of family offices. It creates a safe, authentic, and strategic space where meaningful conversations can happen around long-term vision, succession, private capital, and the future of wealth in Mexico.

More than an event, Cumbre Legacy is a **movement designed to build a stronger** and more connected community of Mexican family offices, helping elevate financial education, strengthen decision-making, and position Mexico alongside the world's leading financial centers.

Designed to support and strengthen the wealth perspective, creating a trusted environment where investors and family offices can openly discuss allocation strategies, governance, due diligence, and long-term partnerships always with the highest standards of **discretion, privacy, and confidentiality**.





Grupo Mesarey

Next-generation single family office headquartered in Guadalajara, with strong roots in León, Guanajuato, where its origin and business strength were established. It integrates an exclusive group of infrastructure and production companies across the Bajío region that share a common vision: to **collaborate strategically, create long-term value, and leave a lasting legacy.**

Through a diversified portfolio spanning public markets, real estate, and alternative investments, Mesarey combines strategic capital allocation with long-term wealth preservation and generational vision.

Prestel & Partner

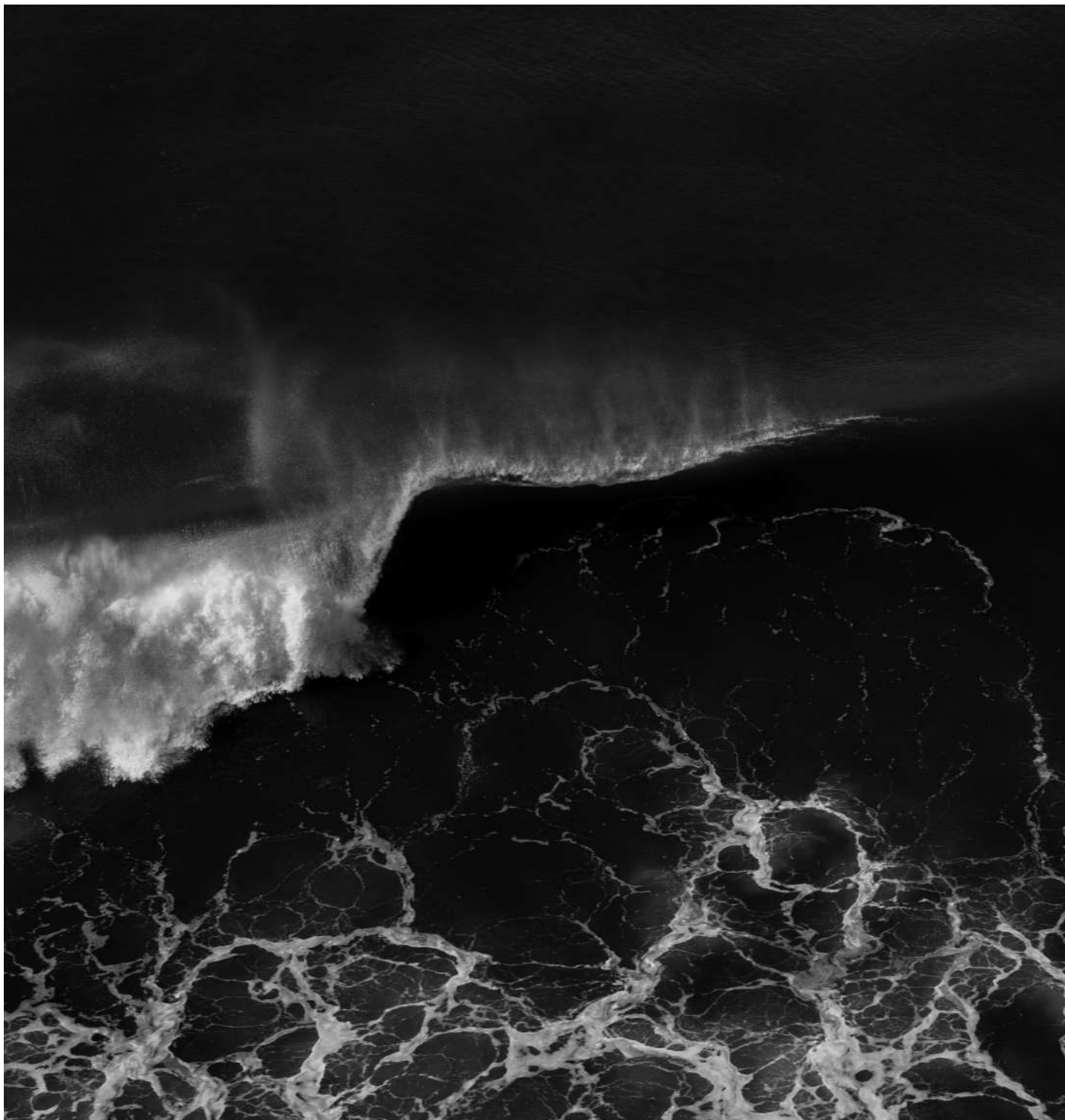
The **Global leader in Family Office Forums**, with over 15 years of experience and more than 50 international conferences successfully hosted in the world's leading financial cities. Their exclusive events are designed for family principals, family office C-suite executives, wealth owners, private investors, and select partners to exchange best practices in governance, investments, and long-term wealth preservation.

Held in prestigious destinations such as London, New York, Los Angeles, Zurich, Dubai, Singapore, and Riyadh, Prestel & Partner **creates trusted spaces for high-level networking**, meaningful introductions, and strategic conversations among the world's most influential family offices.



WELCOME TO A NEW ERA OF LEGACY.

A real, immersive gathering designed to awaken what we often forget: that legacy is not built through strategy alone, but through human vision, honest conversation, and decisions that come from the core.



HOW IT BEGINS?



It's born from the need for a safe, authentic, and highly trusted space within Mexico's family office ecosystem, one truly dedicated to legacy, wealth preservation, and the long-term vision of generational capital.

While many existing events touch on fragments of these topics, **very few are built entirely from the family office perspective**. Most remain heavily institutional, transactional, or disconnected from the real conversations that wealth creators, first-generation entrepreneurs, legacy families, and rising generations need to have.

Mexico is also **entering a defining moment of financial transformation**. Traditional banking structures are no longer the only center of wealth strategy, and a new era of private capital, micro family offices, independent investing, and financial education is reshaping the landscape across all levels of society.

Cumbre Legacy exists to become that epicenter, a platform where trust becomes alliance, **where alliance becomes strength**, and where a stronger future for Mexican family offices can be built from within.



EVENT FORMAT

2027



2 Days of Activities + (In-Person Event).



+200 Carefully Selected Attendees.

**+20 B
USD**

Combined Attendee Net Worth Value.



Commitment to Gender Equity Among Attendees and Speakers.

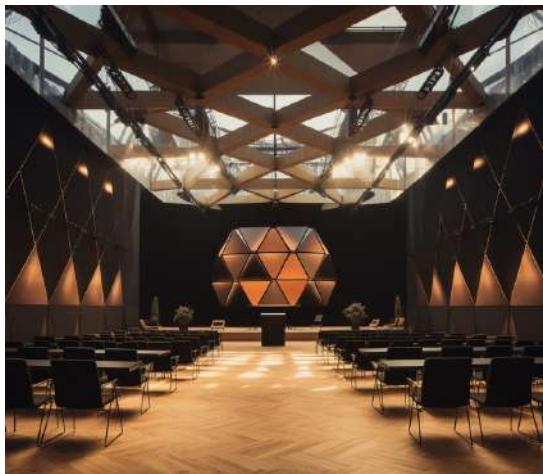


+25 Elite Professional Speakers and Strategic Alliances.

*Superior Quality and Exclusivity
Across All Activities and Visual
Experiences.*



UNIQUE DIFFERENTIATION *Signature*



PRIVATE PLATFORM

"Our motto is quality not quantity. The creation of a select number of exclusive events, and the satisfaction of every attendee at our Family Office Forums are our primary objectives."

Prestel & Partner

Fifteen Years of Successful Family Office Forum Conferences
Trust and share in Prestel & Partner's **expertise**

VOICES FROM WITHIN

We understand the perspective because we live it: the challenges, the responsibility, and the need for a trusted space built from within, not from the outside.

Mesarey



New-generation Family Office perspectives in Mexico
Bridging traditional wealth with **modern vision**



UNIQUE DIFFERENTIATION *Signature*

MEANINGFUL TOPICS

Carefully curated topics designed so anyone can understand Mexico's evolving economic landscape, regardless of industry, background, or perspective. Every conversation is **built to provide clear insight** into what is happening in Mexico today, the challenges shaping the future, and the opportunities that will define the next generation of legacy and private wealth.



ACTIONABLE LEGACY INTELLIGENCE

Every insight, framework, and strategic perspective shared is built to be applied in real decision-making from day one. More than ideas, it provides practical tools for attendees to navigate wealth, legacy, and private capital with clarity while becoming part of a **new community built for long-term impact** and meaningful action.



THE VENUE



SOLAZ RESORT
LOS CABOS



Solaz Resort, a luxurious haven in Baja California Sur, was crafted by the finest Mexican talent to celebrate the striking contrast between the sparkling ocean and arid desert, opulence and raw nature, and artistry and breathtaking landscapes of the region. At Solaz, guests can indulge in the **ultimate luxury experience** as they explore the natural wonders of the Baja Peninsula through its sophisticated architecture, sumptuous culinary offerings, and captivating art.

The resort embodies the epitome of luxury and the soul of Baja, and we invite you to join us and discover all that this extraordinary destination has to offer. **From relaxation to adventure**, Solaz Resort is the perfect place to escape and indulge in lavish comfort.

📍 KM 18.5 Carretera Transpeninsular CSL-SJC Access B Cabo
Real, 23405 San José del Cabo, B.C.S.



THE VENUE

YOUR PARADISE AT LOS CABOS

Discover a rare sanctuary where architecture, art and nature converge. From luminous rooms to expansive residences, every detail at Solaz is designed to connect you with Baja's beauty.



A premier destination of ultimate luxury, widely regarded as one of the finest settings for **high-level professional events, private gatherings**, and world-class experiences. It blends award-winning architecture, exceptional hospitality, and a deep connection to its natural surroundings, creating an environment that feels both inspiring and intentional.

Every space is designed to elevate conversation, foster meaningful connections, and support moments of strategic importance, making it an ideal venue where business, culture, and legacy naturally converge.



HOTEL RECOGNITIONS



2026 Responsible Hospitality

Recognized in 2026 for Responsible Hospitality, highlighting Solaz's commitment to sustainable luxury, community impact, and environmentally conscious operations in Los Cabos.



2024 Readers' Choice Award - Condé Nast Traveler

Awarded the 2024 Condé Nast Traveler Readers' Choice Award, recognizing Solaz among the world's most exceptional luxury hospitality destinations.



Green Key Award

Green Key Certified, recognizing Solaz's commitment to sustainable hospitality, environmental responsibility, and conscious luxury standards.



Obras Cemex Award

Recipient of the Premio Obras CEMEX, recognizing Solaz for excellence in architectural design, innovation, and outstanding construction within luxury hospitality.



AHEAD Awards (2020)

Winner at the 2020 AHEAD Awards, recognizing outstanding hospitality design and beachfront luxury experience excellence.



2025 Michelin Guide Mexico

Featured in the 2025 Michelin Guide Mexico for its restaurant Al Pairo, recognizing culinary excellence and standout gastronomic experience.





WEALTH AND FAMILY OFFICE PERSPECTIVE 101

Full Agenda - (TBA)

The agenda in this edition of Cumbre Legacy is curated around a **Wealth and Family Office perspective**, reflecting the transformation of Mexico's financial and legacy landscape. It explores **the rise of independent wealth managers** and family offices, the shift away from traditional banking, and the move toward **more sophisticated and personalized capital** structures. Key topics include the separation of business and personal assets, private market realities, portfolio construction, and **the truth of private banking in Mexico**. It also features legacy voices from influential families, co-investment dynamics, Family Office team building, and the role of community in long-term wealth. A **Mexico 360** perspective provides an unfiltered view of the country's opportunities, risks, and future catalysts.



ABOUT THE EVENT

At Cumbre Legacy, we understand that food and beverages are not a complement, but an essential part of the experience. That is why every ingredient has been carefully selected, prioritizing organic quality, traceability, and a **memorable taste**.

From the coffee served during breaks to the water placed on each table, everything is designed to subtly but powerfully **elevate the overall experience**.

The menu has been exclusively created for the summit by a top national chef, with the goal of offering not only culinary excellence but also a **sensory narrative** that aligns with the spirit of the event.

Every element, the cutlery, the tableware, the presentation of beverages, has intention and purpose. Because at Cumbre Legacy, **we believe details matter**.

And when it comes to legacy, everything should reflect who you are, where you are going, and what you are building.



*Image is for illustrative purposes only and may not reflect the final presentation.**

A truly immersive experience designed to reflect the sophistication, authenticity, and vision of each attendee.





Image is for illustrative purposes only and may not reflect the final presentation.*



ELEVATED SENSORY JOURNEY

*At Cumbre Legacy, we believe in offering **limitless experiences**, carefully designed for each profile. For those who appreciate the art of high-level mixology, we have curated a **special surprise that awakens the senses** and honors every detail.*



Paulo de la Peña



Paulo de la Peña has over 7 years of experience in the beverage industry, specializing in classic and signature cocktail creation. He is trained in **the sensory dimensions** of flavor and brings together diverse cultural influences in his work, from tiki traditions to classic cocktail craft. His expertise in agave spirits has taken him beyond Mexico, with international experience in the United States, including New York and Los Angeles.

He is the founder of “**Snowbird Cocktail Society**”, a company focused on bespoke events and professional training. Known for delivering refined sensory experiences, he carefully balances flavor and aroma to create distinctive, memorable cocktails. He is also recognized as one of the most prominent bartenders in the Mexican metropolitan region.



ABOUT THE SERVICE

In high-level events around the world, it is common to find a service that is functional and well executed.

Rarely, however, does one experience something truly exceptional. Details get lost, attention becomes generic, and what is extraordinary becomes rare.

At Cumbre Legacy, we do not aspire to functionality. **We aspire to memorability.** To a service that is felt, remembered, and recommended. We want every attendee to experience something designed to reflect exactly what our event represents:

Calm
Tranquility
Sophistication
Legacy-driven vision
Trust

That is why every member of the team serving the summit has been carefully selected not only for their skills, but for their energy, composure, and empathy. **Everything is designed to create an authentic synergy** between attendees, speakers, and operational staff. Here, everyone operates on the same frequency.

In addition, each attendee will have a personalized profile accessible to the entire staff, allowing the team to understand and anticipate their needs whatever they may be. Because when it comes to your legacy, every detail matters. And at Cumbre Legacy, you matter.

Each attendee will also be assigned an experience manager responsible for their needs and concerns, ensuring not only a smoother experience, but also a deeper and more strategic connection with the entire event ecosystem.



IMMERSIVE EXPERIENCE.



The world's best events share one thing in common: an obsession with detail.

We don't just design an atmosphere of focus and clarity; we carefully consider everything from the aromas to the pace at which information is presented, making it easier to understand and retain. We want every moment of the agenda to bring out your best, not only intellectually, but also emotionally and sensorially.

At Grupo Mesarey, through our experience in the electronic music industry, from promoters to clubs, we have learned that the best events in the world share one thing in common: an obsession with detail. We bring that same level of attention to Cumbre Legacy, because when the environment is in harmony with your intention, everything you learn becomes far more meaningful.



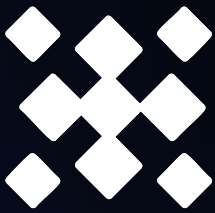
A TRUE PLATFORM



Cumbre Legacy is more than an event: it is a new platform that keeps Mexico's Family Office community connected, informed, and engaged with global opportunities.



Legacy With Intention



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