

## 2019 Forbes/SHOOK Boston Teams Event

Boston Marriott Long Wharf

Thursday  
November 14, 2019

### TIME

### SESSION & SPEAKER

1:00 pm

Registration begins

1:30 - 1:40 pm

**IMPACT**

— [RJ Shook](#) – Founder, SHOOK Research & Forbes Contributor

1:40 - 1:45 pm

SHOOK “Talks”

1:45 - 2:05 pm

Is Value Investing Dead...or Just Sleeping?

— [Joel Greenblatt](#) – Managing Principle & Co-Chief Investment Officer, Gotham Asset Management

2:05 - 2:25 pm

Building the Team of the Future

2:25 - 2:45 pm

Looking Forward - Growth Investing with Ron Baron

— [Ron Baron](#) – CEO & CIO, Baron Funds

2:45 - 3:10 pm

Offense or Defense? How to play the markets heading into 2020

— [Lisa Hornby](#) - Portfolio Manager at Schroders

— Moderator: [Ron Insana](#) - Senior Advisor to Schroders

3:10 - 3:20 pm

[Networking/Refreshments](#)

3:20 - 3:50 pm

**CONCURRENT BREAKOUTS**

1. What's the Right Team Culture for Your Practice?

2. Team Structures and Efficiencies

3:50 - 4:00 pm

[Networking/Refreshments](#)

4:00 - 4:20 pm

Intentional Teams – Successful Common Denominators

4:20 - 4:35 pm

Building a High Impact Team

4:35 - 4:40 pm

SHOOK “Talks”

4:40 - 5:00 pm

Outlook On the Markets

— [Richard Bernstein](#) – CEO & CIO, RBA

5:00 - 5:20 pm

America's #1 Advisor: Building The Right Team: Partnership of Empowerment

— [Jeff Erdmann](#) – Merrill Lynch Private Wealth Management

5:20 - 5:30 pm

Closing Remarks

5:30 - 6:00 pm

Cocktail Reception