

2019 Forbes/SHOOK Top Advisor Summit

New York, NY
Forbes on Fifth—24 5th Ave

Tuesday,
September 10, 2019

TIME	SESSION & SPEAKER
1:30 - 1:40 pm	Welcome Remarks — R.J. Shook , Founder, SHOOK Research & Forbes Contributor
1:40 - 1:45 pm	SHOOK "Talks" — Nadine Wong , Morgan Stanley Private Wealth Management — Introduction: Jonathan Ross , Vice President, Senior Advisor Consultant, Invesco
1:45 - 2:10 pm	Is Value Investing Dead...or Just Sleeping? — Joel Greenblatt , Managing Principal & Co-Chief Investment Officer, Gotham Asset Management — Introduction: Clint Kugler , Head of Business Development, Gotham Asset Management
2:10 - 2:40 pm	Top Portfolio Managers Discuss Global Investment Strategies — Brendan Ahern , CIO, KraneShares — Christopher Davis , Chairman & Portfolio Manager, Davis Advisors — Matthew McLennan , Head of Global Value Team, First Eagle — Moderator: Brian Pfeiffer , Morgan Stanley Private Wealth Management — Introduction: Eric Monte , Director, KraneShares
2:40 - 2:55 pm	The New Partnership Model: Building Your Team of Teams — Matthew P O'Connor , Chairman & Chief Executive Officer, American Funds Distributors, part of Capital Group — Introduction: Michael Schweitzer , Head of HNW, American Funds Distributors, part of Capital Group
2:55 - 3:10 pm	Marketing Your Team's Forbes Recognition — Emily Rubin , UBS Financial Services — John Olson , Merrill Lynch Wealth Management — Moderator: Paul Reiss , Vice President, Forbes Media — Introduction: Jac McLean , Senior Managing Director, New York Life Investments
3:10 - 3:20 pm	Break
3:20 - 3:25 pm	SHOOK "Talks" — Robert Waldele , Merrill Lynch Wealth Management — Robert Bruno , President, First Eagle Funds Distributors & Head of Distribution, First Eagle Funds
3:25 - 3:50 pm	Looking Forward - Growth Investing with Ron Baron — Ron Baron , CEO & CIO, Baron Funds — Introduction: David Judice , Head of Intermediary Sales and National Accounts, Baron Funds
3:50 - 3:55 pm	SHOOK "Talks" — Michael Bapis , Rockefeller Capital Management — Introduction: Dodd Kittsley , National Sales Director, Davis Advisors
3:55 - 4:20 pm	Becoming the Longevity Advisor of the Future — Anthony Valente , Morgan Stanley Wealth Management — Sharon Sager , UBS Private Wealth Management — Moderator: Julie Genjac , Managing Director, Strategic Markets, Hartford Funds — Introduction: Chris Unis , Regional Vice President, Advisor Consultant, Hartford Funds
4:20 - 4:55 pm	Outlook on the Market...and What's Ahead — Bob Doll , Chief Equity Strategist, Nuveen — Introduction: Dave Dunton , Senior Managing Director & National Sales Manager, Nuveen
4:55 - 5:00 pm	Closing Remarks — R.J. Shook , Founder, SHOOK Research & Forbes Contributor
5:00 - 5:45 am	Cocktail Reception