

ON-THE-ROAD

The Midtown Hilton New York City

Thursday,
April 7, 2022

TIME	SESSION & SPEAKER
12:30-12:40 pm	Opening Remarks — RJ Shook , Founder, SHOOK Research & Senior Forbes Contributor
12:40-1:00 pm	How the Best Become the Best — Joseph Kara , Morgan Stanley Private Wealth Management — Dr. Kevin Elko , Advisor Advancement Institute, New York Life Investments — Moderator: Cesar Bastida , Director, Advisor Advancement Institute, New York Life Investments
1:00-1:15 pm	Using Asymmetric Risk to Improve Client Outcomes — Steve Deschene , Director of Client Research, Capital Group, Home of American Funds — Ron Dottin , HNW Portfolio Specialist, Capital Group, Home of American Funds
1:15-1:35 pm	Inflation, Here to Stay? — May Tong , CFA, Managing Director & Portfolio Manager, Principal — James Mace , CFA, CAIA, Sr. Investment Strategist, BNY Mellon — Moderator: Geri Pell , Ameriprise Financial Services
1:35-1:55 pm	Choosing the Right Alternatives for an Inflationary Environment — Frank Cohen , Sr. Managing Director, Real Estate, Blackstone — Steve Kuppenheimer , Senior Managing Director, Blackstone Credit — Moderator: Rick Salvino , Merrill Private Wealth Solutions, Blackstone — Jeanette Pieper , Managing Director, Private Wealth Solutions, Blackstone
1:55-2:10 pm	Transformational Conversations: Blueprints from America's Top Advisor Teams — Chris Brady , Divisional VP, AIG Financial Distributors
2:10-2:20 pm	Break
2:20-2:35 pm	Senior Loans: Solving for Yield and Interest Rate Risk — Taylor Watts , Senior Client Portfolio Manager, Invesco Global Senior Loans — Moderator: Florina Shutin , Wells Fargo Advisors
2:35-2:55 pm	Building Investment Portfolios in Today's Environment: Rising Rates, Soaring Inflation and Fading Fiscal Stimulus, Oh My! — Mike Arone , Chief Investment Strategist, State Street Global Advisors SPDR ETFs — Moderator: Steven Grill , J.P Morgan Wealth Management — John Faron , VP & Sr. Regional Consultant, State Street Global Advisors SPDR ETFs
2:55-3:15 pm	Going Against Your Instincts — Brian Gallary , Head of Strategy & Consulting, First Trust Portfolios L.P. — Matt Henrici , Senior Vice President, Institutional Sales, First trust Portfolios L.P.
3:15-3:35 pm	Conversation with Anthony Scaramucci — Anthony Scaramucci , Founder & Managing Partner, SkyBridge Capital — Moderator: David Bahnsen , The Bahnsen Group
3:35-3:55 pm	Defining Your Ideal Client: How Top Teams Drive Growth by Staying Focused — Mary Deatherage , Morgan Stanley Private Wealth Management — Jason Katz , UBS Private Wealth Management — Moderator: Ron Dottin , HNW Portfolio Specialist, Capital Group, Home of American Funds

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3:55-4:15 pm

Public and Private Credit-Where are the Opportunities

- [Andrew Park](#), Sr. Vice President, Alternative Credits, First Eagle Investments
- Moderator: [Steven D'Amico](#), Morgan Stanley Wealth Management

4:15-4:35 pm

Leveraging Your Team for Optimal Performance

- [Linda Modico](#), UBS Wealth Management
- Moderator: [Jon Ross](#), Market Leader & Sr. Advisor Consultant, Invesco

4:35-4:55 pm

Globalization is Irreversibly Contracting

- [Richard Bernstein](#), CEO & CIO, Richard Bernstein Advisors
- [Terry Ober](#), National Director, Richard Bernstein Advisors

4:55-5:05 pm

SHOOK One's – My Best Idea

- [Jeff Erdmann](#), Merrill Private Wealth Management

5:05-5:10 pm

Closing Remarks

- [Frank Berland](#), Managing Partner, SHOOK Research

5:10-6:00 pm

Cocktail Reception Presented by Invesco

Dine-arounds with Partners Following