Forbes | SHOOK

ON-THE-ROAD

The Maybourne, Beverly Hills

Thursday, February 24, 2022

TIME	SESSION & SPEAKER
12:30-12:40 pm	Opening Remarks — RJ Shook, Founder, SHOOK Research & Senior Forbes Contributor
12:40-12:45 pm	SHOOK Ones – My Best Idea — Amir Mossanen, Truist
12:45-1:05 pm	How the Best Become the Best — Randy Conner, Churchill Management Group — Dr. Kevin Elko, Advisor Advancement Institute, New York Life Investments — Moderator: Jen Tarsney, Director, Practice Management, New York Life Investments
1:05-1:20 pm	Using Asymmetric Risk to Improve Client Outcomes — Steve Deschenes, Director of Client Research, Capital Group, Home of American Funds — Michael Schweitzer, Director of Distribution, HNW, Capital Group, home of American Funds
1:20-1:35 pm	FE Philosophy Perfectly Positioned for Inflation and Interest Rate Volatility — Manish Gupta, Portfolio Manager, First Eagle Investment — Moderator: Robert Bruno, President & Head of Distribution, First Eagle Investments
1:35-1:40 pm	SHOOK Ones – My Best Idea — Sara Wendt, Miracle Mile Advisors
1:40-2:00 pm	Choosing the Right Alternative for an Inflationary Environment — A.J. Agarwal, Sr. Managing Director, Real Estate, Blackstone — Brad Marshall, Sr. Managing Director, Credit, Blackstone — Moderator: Mark Binder, UBS Private Wealth Management — Bill Tugurian, Managing Director, Private Wealth Solutions, Blackstone
2:00-2:10 pm	Break
2:10-2:25 pm	Senior Loans: Solving for Yield and Interest Rate Risk — Taylor Watts, Senior Client Portfolio Manager, Invesco Global Senior Loans — Moderator: Marc Rosenbach, Wells Fargo Advisors — Nick Cirbo, Senior Advisor Consultant, Invesco
2:25-2:40 pm	Managing a Rising Rate Environment with Private Markets — Joseph Moran, Managing Director, Institutional RIA Sales, Apollo — Moderator: Jake Tracy, Director, CAIS
2:40-2:55 pm	Carbon Markets: Asymmetric Returns, Low Correlations, Climate Impact — Luke Oliver, Managing Director & Head of Strategy, KraneShares — Bill Fagan, Director, Client Services, KraneShares
2:55-3:10 pm	Can the Markets and Economy Prosper in a Post-Stimulus World? — Stephen Kane, Co-Chief Investment Officer, TCW, Sub-advisor First Trust AdvisorsActively Managed ETFs — Jeff Krogh, Regional VP, First Trust
3:10-3:30 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 — Moderator: John Shadden, Morgan Stanley Private Wealth Management — Darius Tandy, VP of Private Wealth Division, State Street Global Advisors

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3:30-3:50 pm	Defining Your Ideal Client: How Top Teams Drive Their Growth by Staying Focused — Richard Jones, Merrill Private Wealth Management — Drew Freides, UBS Private Wealth Management — Moderator: Michael Schweitzer, Director of Distribution, HNW, Capital Group, home of American Funds — Jameson Greenstone, Wealth Management Consultant, Capital Group | American Funds
3:50-4:10 pm	Leveraging Your Team for Optimal Performance — Ron Munman, J.P. Morgan Wealth Management — YC Lama, Morgan Stanley Wealth Management — Moderator: Wayne Badorf, Executive Consultant, Invesco Global Consulting — Nick Cirbo, Senior Advisor Consultant, Invesco
4:10-4:15 pm	Closing Remarks — • Frank Berland, Managing Partner, SHOOK Research
4:30-5:30 pm	Cocktail Reception Presented by Invesco
	Dine-arounds with Partners Following