Forbes | SHOOK

ON-THE-ROAD

JW Marriot Union Square, San Francisco

Tuesday, March 1, 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 — Jesse Bromberg, Morgan Stanley Wealth Management
12:45-1:05 pm	How the Best Become the Best — George Papadoyannis, Ameriprise Financial Services — Dr. Kevin Elko, Advisor Advancement Institute, New York Life Investments — Moderator: Jen Tarsney, Director, Advisor Advancement Institute, New York Life Investments
1:05-1:25 pm	Choosing the Right Alternatives for an Inflationary Environment — A.J. Agarwal, Sr. Managing Director, Real Estate, Blackstone — Steve Kuppenheimer, Sr. Managing Director, Blackstone Credit — Moderator: Matt Sheehan, Morgan Stanley Private Wealth Management — Michael Dupuis, Managing Director, Private Wealth Solutions, Blackstone
1:25-1:45 pm	Keeping Your Head While Those Around You Lose Theirs: *Six Strategies to help Clients Navigate Fluctuating Markets* — Chris Davis, Chairman and Portfolio Manager, Davis Advisors — Joe Emhof, Regional Director, Davis Advisors
1:45-2:00 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
2:00-2:05 pm	SHOOK Ones – My Best Idea — Michael Riherd, Wells Fargo Advisors
2:05-2:25 pm	How to Navigate the Rising Rate Environment — Manish Gupta, Portfolio Manager, First Eagle Investments — David Marshak, Managing Director at Wellington Management, Fixed-Income Portfolio Manager, Hartford Funds — Moderator: Matt Gallo, Merrill Lynch Wealth Management — Doug Stockslager, regional VP & Advisor Consultant, Hartford Funds
2:25-2:35 pm	Break
2:35-2:50 pm	Senior Loans: Solving for Yield and Interest Rate Risk — Taylor Watts, Senior Client Portfolio Manager, Invesco Global Senior Loans — Moderator: Cheryl Young, Morgan Stanley Wealth Management — Todd Barney, Sr. Advisor Consultant, Invesco
2:50-3:10 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: Ash Chopra, Merrill Private Wealth Management — James Scola, VP & Regional Consultant, State Street Global Advisors

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Thursday, March 1, 2022

TIME	SESSION & SPEAKER
3:10-3:25 pm	Navigating Venture Capital — Matt Ahern, Managing Principal, Knightsbridge Advisers — Moderator: Will Dzugan, Vice President & Product Specialist, CAIS
3:25-3:45 pm	Going Against Your Instincts — Brian Gallary, Head of Strategy & Consulting, First Trust Portfolios L.P. — Sean Biddinger, VP, ETFs & SMA Specialist, First Trust
3:45-4:05 pm	Defining Your Ideal Client: How Top Teams Drive Growth by Staying Focused — Cheryl Smith, Merrill Lynch Wealth Management — Michael Evans, UBS Private Wealth Management — Moderator: Michael Schweitzer, Director of Distribution, HNW, Capital Group, home of American Funds — Michael Stern, Wealth Management Consultant, Capital Group | American Funds
4:05-4:20 pm	I want to work at Amazon — Richard Bernstein, CEO and CIO, Richard Bernstein Advisors — Terry Ober, National Director, Richard Bernstein Advisors
4:20-4:35 pm	Carbon markets: Asymmetric Returns, Low Correlations, Climate Impact — Luke Oliver, Managing Director, KraneShares — Bill Fagan, Director, Client Services, KraneSharest
4:35-4:55 pm	Leveraging Your Team for Optimal Performance — Adrianne Yamaki, Strategic Wealth Capital, LLC — Sandra Wang, Morgan Stanley Wealth Managment — Moderator: Wayne Badorf, Executive Consultant, Invesco Global Consulting Teresa Ferrante, Market Leader & Sr. Advisor Consultant, Invesco
4:55-5:00 pm	Closing Remarks — Frank Berland, Managing Partner, SHOOK Research
5:00-6:00pm	Cocktail Reception presented by Invesco
	Dine-arounds with Partners Following