

Forbes | SHOOK ALTERNATIVES SUMMIT

MARCH 10, 2026 | LOS ANGELES, CA

Tuesday, March 10, 2026

CE CREDITS AVAILABLE

SESSION & SPEAKER

LOCATION

SHOOK Ones: Value of Adding a Chief of Staff to a Teams Practice

- **John Shadden**, Morgan Stanley Private Wealth Management
- *Intro: **Jacob Shook**, Associate VP | Rankings, SHOOK Research*

BALLROOM

Rethinking Real Estate's Role in Income Portfolios

- **Charlie Rose**, Head of Real Estate Credit, Invesco

GenAI: The Next Great Step Change

- **Abhi Arun**, General Partner, Alkeon Capital

SHOOK Ones: Team Synergy

- **Nicholas Schirripa**, UBS Wealth Management
- *Intro: **Madison Rizzo**, Associate VP | Senior Partnership Manager, SHOOK Research*

Identifying Bespoke Opportunities and Developing Unique Partnerships in Private Markets

- **Michael Woolhouse**, Co-Managing Partner, TPG GP Solutions
- Moderator: **Karin Longhurst**, Morgan Stanley Private Wealth Management
- *Intro: **Matt Sekera**, Managing Director, TPG*

Evolution of Private Credit: What Now and What's Next?

- **Jason Mandinach**, Head of Alternative Credit and Private Strategies, PIMCO
- Moderator: **David Hou**, Evoke Advisors
- *Intro: **Matt Melhado**, Senior Vice President & Account Manager, PIMCO*

SHOOK Ones: Team Culture

Credit Markets Outlook: Risks, Rates, and Resilience

- **Jeff Sherman**, Deputy Chief Investment Officer, DoubleLine
- Moderator: **Alex Shahidi**, Evoke Advisors

The Infrastructure Behind AI, Data, Power, and Transportation

- **Erwin Thompson**, Partner, Infrastructure and CEO of EQIC, EQT Partners

Building the Room Before You Build the Revenue

- **Lara Magnusen**, Merrill Private Wealth Management
- Moderator: **Nick Cirbo**, VP, Market Leader, Invesco

Ideas from LA's Top Private Wealth Team

- **Richard Jones**, Merrill Private Wealth Management
- Moderator: **Steven Pogorelec, EVP**, Head of Private Wealth, U.S. Global Wealth Management, PIMCO

Venture Capital Meets National Security: Investing in Dual-Use Space & Defense

- **Daniel Kleinmann**, Co-Founder & General Partner, Balerion Space Ventures
- Moderator: **Aidan Daoussis**, Senior Associate, Balerion Space Ventures

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