

2019 Forbes/SHOOK Chicago Teams Event

JW Marriott

Thursday
November 21, 2019

TIME	SESSION & SPEAKER
1:00 pm	Registration begins
1:30 - 1:40 pm	IMPACT — RJ Shook , Founder, SHOOK Research & Forbes Contributor
1:40 - 1:45 pm	SHOOK "Talks" — Ted Davis – Morgan Stanley Wealth Management
1:45 - 2:05 pm	Is Value Investing Dead...or Just Sleeping? — Joel Greenblatt - Managing Principle & Co-Chief Investment Officer, Gotham Asset Management — Introduction: Lisa Charkoudian – Director of Sales & Distribution, Gotham Asset Management
2:05 - 2:25 pm	Maximizing Your Business — Brian Gallary – Senior Vice President/Head of Strategy & Consulting, First Trust Advisors
2:25 - 2:45 pm	Outlook on the Markets — Richard Bernstein , CEO & CIO, RBA — Introduction: Tim Kuhn – Portfolio Specialist, RBA
2:45 - 3:05 pm	Building the Team of the Future — Raj Bhatia – Merrill Private Wealth Management — Jim Moriarity – Morgan Stanley Private Wealth Management — Moderator: Robert Merrell – Midwest Sales Director, First Eagle Funds
3:05 - 3:15 pm	Networking/Refreshments
3:15 - 3:45 pm	Chicago Breakout Room — Tax Managed Investing in the Current Equity Environment <u>Burnham Ballroom</u> 1. Team Structure and Efficiencies — Rod Loewenthal – UBS Financial Services Chicago Breakout Room 2. Investing in the Current Equity Environment — Joel Greenblatt – Managing Principle & Co-Chief Investment Officer, Gotham Asset Management — Moderator: Andy Burish – UBS Financial Services
3:45 - 3:55 pm	Networking/Refreshments
3:55 - 4:15 pm	Becoming the Longevity Advisor of the Future — Joe Silich – Morgan Stanley Wealth Management — Andy Timmerwilke – Merrill Lynch Wealth Management — Moderator: John Diehl – Senior Vice President, Hartford Funds — Introduction: Tom Dewbray – Advisor Consultant, Hartford Funds
4:15 - 4:35 pm	What's the Right Structure to Serve the Affluent — Ajay Desai – UBS Private Wealth Management — Ben Leshem – HLM Capital Management Group — Moderator: Dodd Kittsley – Director, Davis Advisors — Introduction: Bill Coughlin – Regional Director, Davis Advisors

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4:35 - 4:40 pm	SHOOK "Talks" — Sharon Oberlander – Merrill Lynch Wealth Management
4:40 - 5:00 pm	Building a High Impact Team — Robert Lanigan – Morgan Stanley Private Wealth Management — Jeff Morse – Merrill Lynch Private Wealth Management — Moderator: Sarah Bourgraf – Senior Advisor Consultant, Invesco
5:00 - 5:20 pm	Outlook on the Markets and What's Ahead — Bob Doll – Chief Equity Strategist, Nuveen
5:20 - 5:30 pm	Closing Remarks — RJ Shook – Founder, SHOOK Research & Forbes Contributor
5:30 - 6:00 pm	Cocktail Reception