

Forbes | SHOOK

TOP WOMEN ADVISOR SUMMIT

Sunday,
May 22

Monday,
May 23

Tuesday,
May 24

TIME	SESSION & SPEAKER
12:00-6:00 pm	Registration – <i>Angle</i>
6:00-9:00 pm	Pre-Party Hosted by Capital Group American Funds – <i>Courtyard Lawn</i>
9:00 am	Registration – <i>Angle</i>
3:00-4:30 pm	PRE-CON – <i>Plaza Ballroom</i>
3:00-3:20 pm	How Female Business Leaders Invest for Tomorrow — Jennifer Tarsney , Managing Director, Advisor Advancement Institute, New York Life Investments
3:20-3:40 pm	Succession Planning — Melissa Corrado-Harrison , UBS Private Wealth Management — Mary Deatherage , Morgan Stanley Private Wealth Management —Moderator: Caroline Gundeck , Managing Director & Head of PWM Client and Field Engagement, Morgan Stanley Wealth Management
3:40-4:00 pm	Power Up Your Personal Brand — Amy Osborne , Senior Learning Consultant, Franklin Templeton Investments — Michelle Peterson , VP & Senior Advisor Consultant, Franklin Templeton Investments
4:00-4:30 pm	SHOOK Best Idea Competition JUDGES: — Heather Crist , Head of Field Engagement, UBS Wealth Management USA — Krista Goryl , Head of HNW Strategy & Growth, Wells Fargo Wealth & Investment Management — Kenneth Correa , Managing Director & National Business Development Executive, Merrill Lynch Wealth Management
5:30-6:30 pm	COCKTAIL RECEPTION – <i>Ocean Ballroom & Terrace</i>
6:30 pm	GALA DINNER – <i>Grand Ballroom</i>
6:45-7:00 pm	“Stories” — Liz Shook , COO & Co-Founder, SHOOK Research
7:00-7:15 pm	“The SHOOK Effect” — R.J. Shook , Co-Founder & President, SHOOK Research, Senior Forbes Contributor — Jennifer Tarsney , Managing Director, Advisor Advancement Institute, New York Life Investments
7:30-7:50 pm	Four Vineyards. Four Sisters. Fourth Generation. Continuing a Family Legacy. — Angelina Mondavi , Winemaker & Co-Proprietress, Dark Matter Wines — Alycia Mondavi , CEO & Co-Proprietress, Dark Matter Wines — Andy Sieg , President, Merrill Lynch Wealth Management — Kirsten Pickens , Managing Director & Co-Head U.S. Distribution, FS Investments
8:00-9:00 pm	CHAMPAGNE RECEPTION – <i>Ocean Ballroom & Terrace</i>
7:00-8:00 am	Breakfast
8:00-8:10 am	Coffee with Lizzy — Liz Shook , COO & Co-Founder, SHOOK Research
8:10-8:15 am	SHOOK Ones – My Best Idea — Judy Fredrickson , UBS Private Wealth Management — Nilisa Roberts , Divisional VP, AIG Financial Distributors

Forbes | SHOOK

TOP WOMEN ADVISOR SUMMIT

Tuesday,
May 24 - cont.

TIME	SESSION & SPEAKER
8:15-8:35 am	<p>Discussion with Jonathan Gray —Jonathan Gray, President & COO, Blackstone —Moderator: Wendy Holmes, UBS Private Wealth Management —R.J. Shook, Co-Founder & President, SHOOK Research, Senior Forbes Contributor</p>
8:35-8:55 am	<p>Longevity and Retirement —Maddi Dessner, Director of Global Asset Class Services, Capital Group, Home of American Funds —Angelia Hunter, Senior VP & Sales Development Manager, Capital Group, Home of American Funds</p>
8:55-9:05 am	<p>SHOOK Stories —Dianna Smith, Morgan Stanley Wealth Management</p>
9:05-9:35 am	<p>Our Fight. A Mother and Daughter's Story. —Sofie & Pam</p>
9:35-9:55 am	<p>REFRESHMENT BREAK</p>
9:55-10:10 am	<p>Getting Real About Rates —Kay Herr, Head of Research, Global Fixed Income, Currencies & Commodities (GFICC), J.P. Morgan Asset Management —Moderator: Deborah Briskin, Merrill Lynch Wealth Management</p>
10:10-10:20 am	<p>SHOOK Stories —Rosalie Hunter, Merrill Private Wealth Management —Moderator: Jen Auerbach-Rodriguez, Managing Director, Head of Strategic Growth Markets, Merrill Lynch Wealth Management</p>
10:20-10:40 am	<p>Building the Team of the Future —Anna Winderbaum, Morgan Stanley Private Wealth Management —Patricia Baum, RBC Wealth Management —Moderator: Joan Solotar, Global Head of Private Wealth Solutions, Blackstone —Jeanette Pieper, Managing Director, Private Wealth Solutions, Blackstone</p>
10:40-10:50 am	<p>SHOOK Stories —Nancy Popovich, Baird</p>
10:50-11:10 am	<p>Be Prepared. Be Empowered. —Leslie Geller, Wealth Strategist, Capital Group, Home of American Funds —Kristina Page, Regional VP, Capital Group, Home of American Funds</p>
11:10-11:25 am	<p>TRANSITION TO ROUNDTABLES</p>
11:25am-12:15 pm	<p>ROUNDTABLES</p>
12:15-1:15 pm	<p>LUNCH —Liz Shook, Co-Founder & COO, SHOOK Research —Paula Schneider, President & CEO, Susan G. Komen</p>
12:30-12:50 pm	<p>Ready for Takeoff: 2022 Travel Trends —Michael Soloman, Forbes Life Editor —Moderator: Jessica Sibley, Chief Operating Officer, Forbes</p>
1:15-1:25 pm	<p>Business and Team Growth —Colleen O'Callaghan, J.P. Morgan Wealth Management —Moderator: Steve Samuels, Managing Director, Merrill Lynch Wealth Management —Lindsey Nacht, Senior Associate VP, Research Manager, SHOOK Research</p>

Forbes | SHOOK

TOP WOMEN ADVISOR SUMMIT

Tuesday,
May 24 - cont.

TIME	SESSION & SPEAKER
1:25-1:40 pm	Boots on the Ground – What’s Going On in the Real World? — Suzanne Franks , Associate Portfolio Manager, First Eagle Investments —Moderator: Nelrae Ali , Wells Fargo Advisors
1:40-2:00 pm	Forbes/SHOOK Marketing — Rupa Jack , Morgan Stanley Wealth Management — Emily Rubin , UBS Private Wealth Management —Moderator: Jessica Sibley , Chief Operating Officer, Forbes — Susan Swink , Executive Director, J.P. Morgan Asset Management
2:00-2:20 pm	REFRESHMENT BREAK
2:20-2:40 pm	How the Best Become the Best — Mary Jo Harper , Merrill Lynch Wealth Management — Dr. Kevin Elko , Advisor Advancement Institute, New York Life Investments —Moderator: Janet Koh , Director, Advisor Advancement Institute, New York Life Investments — Ashley Blanco , Advisor Consultant, New York Life Investments
2:40-2:45 pm	SHOOK Ones – My Best Idea — Rees Mason , Merrill Lynch Wealth Management — Jenny DeSeno , Senior Analyst, SHOOK Research
2:45-3:00 pm	Navigating Inflation, Policy, and Global Growth — Lara Rhame , Chief U.S. Economist & Managing Director, FS Investments —Moderator: Crystal Ho , Morgan Stanley Private Wealth Management — Ryan Robertson , Co-Head of U.S. Distribution, FS Investments
3:00-3:20 pm	The Fragile Decade: Turning Apprehension into Anticipation — Jeannie Underwood , SVP & Head of Global Atlantic Consulting, Global Atlantic Financial Group
3:20-4:00 pm	Noise, Nuance & Numbers — Cathie Wood , CEO & CIO, Ark Investment —Moderator: Rebecca Burke , Investment Specialist, Ark Investment
4:00-4:15 pm	REFRESHMENT BREAK
4:15-4:25 pm	SHOOK Stories — YC Lama , Morgan Stanley Wealth Management
4:25-4:45 pm	Redefining Success on Your Terms — Lindsey Rhea , Alia Wealth Partners — Melissa Spickler , Merrill Lynch Wealth Management — Madelyn Miller , J.P. Morgan Wealth Management —Moderator: Kimberly Sanders , Senior Vice President, Advisor Business Strategy, Strategic Wealth Services, LPL Financial
4:45-5:05 pm	The Resilient Advisor — Suzette Rothberg , Senior Consultant, Invesco Global Consulting — Callie Almes , Senior Associate VP, Project Leader, SHOOK Research
5:05-5:10 pm	Closing Remarks — Frank Berland , Managing Partner, SHOOK Research
5:10-6:00 pm	COCKTAIL RECEPTION – Courtyard Lawn
6:00 pm	DINE-AROUNDS WITH PARTNERS

Forbes | SHOOK

TOP WOMEN ADVISOR SUMMIT

page
02

Wednesday,
May 25

TIME

SESSION & SPEAKER

7:30-8:30 am	Breakfast
8:30-8:40 am	Opening Remarks — Liz Shook , COO & Co-Founder, SHOOK Research
8:40-8:45 am	SHOOK Ones – My Best Idea — Jennifer Ibarguen , Ameriprise Financial Services — Keeyana St. Aubin , Senior Analyst, SHOOK Research
8:45-9:05 am	Investing in Emerging Markets Amidst the Surge in Yields, Commodity Prices, and COVID in China — Gabriela Santos , Global Market Strategist, J.P. Morgan Asset Management — Beth Nardi , Head of Model Portfolios, J.P. Morgan Asset Management
9:05-9:25 am	Building a Team to Outlast You — Jennifer Garcia , Wells Fargo Advisors — Kimberlee Barrett-Johnson , Ameriprise Financial Services —Moderator: Heather Crist , Head of Field Engagement, UBS Wealth Management, USA
9:25-9:35 am	SHOOK Stories — Edythe De Marco , Merrill Lynch Wealth Management
9:35-9:55 am	REFRESHMENT BREAK
9:55-10:10 am	Investing in International and EM Space — Pragna Shere , Senior Vice President & Portfolio Manager, Alger —Moderator: Stacey Crittenden , Merrill Lynch Wealth Management — Jessica Davis , Regional Director, Alger
10:10-10:30 am	Transformational Conversations: Blueprints from America's Top Advisor Teams — Chris Brady , Senior Regional Vice President, Pacific Life
10:30-10:50 am	Protecting Your Assets and Information in the Digital Age — Rachel Wilson , Head of Wealth Management Data Security & Infrastructure Risk, Morgan Stanley Wealth Management
10:50-11:00 am	The Last Word — R.J. Shook , Co-Founder & President, SHOOK Research, Senior Forbes Contributor