

## ON-THE-ROAD

## The Boston Marriott Long Wharf, Boston

Thursday,  
November 17, 2022

TIME	SESSION & SPEAKER
12:00-12:10pm	<b>Opening Remarks</b> — <b>R.J. Shook</b> , Co-Founder & President, SHOOK Research & Senior Forbes Contributor
12:10-12:15pm	<b>SHOOK One's – My Best Idea</b> — <b>Gary McGuirk</b> , Merrill Private Wealth Management
12:15-12:35pm	<b>Municipal Bonds - Volatility and Opportunities Persist</b> — <b>Chris Roberti</b> , Managing Director & Chief Marketing Officer, MacKay Shields — <b>Jamie Hawes</b> , Advisor Consultant, New York Life Investments
12:35-12:55pm	<b>Corrections, Inflation &amp; Recessions – Top Exhibits to Help Clients Navigate Today's Turbulent Market</b> — <b>Chris Davis</b> , Chairman & Portfolio Manager, Davis Advisors — <b>Steve Coyle</b> , Vice President & Regional Director, Davis Advisors
12:55-1:15pm	<b>The Future of Advice - Insights From the MIT AgeLab</b> — <b>Dr. Joseph Coughlin</b> , Director, MIT AgeLab — Moderator: <b>Bill McManus</b> , Vice President, Hartford Funds — <b>Curtis Ranta</b> , Advisor Consultant, Hartford Funds
1:15-1:35pm	<b>Lessons Learned from the Past 10 Years</b> — <b>Steve Deschenes</b> , Director of Client Research, Capital Group, Home of American Funds
1:35-1:55pm	<b>Choosing the Right Alternatives for an Inflationary Environment</b> — <b>A.J. Agarwal</b> , Sr. Managing Director, Blackstone Real Estate — <b>Brad Marshall</b> , Sr. Managing Director, Blackstone Credit — Moderator: <b>Andrew Billingham</b> , Merrill Lynch Wealth Management — <b>John Cronin</b> , Principal, Blackstone Private Wealth Solutions
1:55-2:10pm	<b>Break</b>
2:10-2:30pm	<b>Thematic Investing Outlook: 2023 and Beyond</b> — <b>Jon Maier</b> , CIO, Global X ETFs — <b>Pedro Palandrani</b> , Director of Research, Global X ETFs — <b>Connor Hawkinson</b> , Regional Investment Consultant, Global X ETFs
2:30-2:50pm	<b>A Conversation With Raj Sharma</b> — <b>John McCarthy</b> , CEO, Starwood Real Estate Income Trust — <b>Raj Sharma</b> , Merrill Private Wealth Management — <b>Kelly Boucher</b> , Sr. Vice President, Starwood Capital
2:50-2:55pm	<b>SHOOK One's – My Best Idea</b> — <b>Brian Strachan</b> , Morgan Stanley Private Wealth Management
2:55-3:15pm	<b>2023 Market Outlook: Finding Clarity Amid Complexity</b> — <b>Mike Arone</b> , Chief Investment Strategist, State Street Global Advisors — Moderator: <b>Peter Princi</b> , Graystone Consulting from Morgan Stanley — <b>James Libutti</b> , Regional Consultant, State Street Global Advisors SPDR ETFs
3:15-3:35pm	<b>Team Structure and Efficiency</b> — <b>Mary Mullin</b> , Merrill Lynch Wealth Management — <b>Camille Valentine</b> , UBS Wealth Management — Moderator: <b>Bill McManus</b> , Vice President, Hartford Funds
3:35-3:55pm	<b>Alternative Investments – Private Equity &amp; Hedge Funds</b> — <b>James Connors</b> , Vice President & Product Specialist, CAIS — <b>Nichole Raftopoulos</b> , Nvest Financial

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3:55-4:00pm

SHOOK One's – My Best Idea

— Patrick Corbett, J.P. Morgan Wealth Management

4:00-4:20pm

Current Issues in Global Energy

— Sam Brothwell, Director Of Research, Energy Income Partners in Partnership with First Trust

4:20-4:30pm

Closing Remarks

— Frank Berland, Managing Partner, SHOOK Research

4:30-5:30pm

Cocktail Reception

6:00pm

Dine-Arounds with Partners