

Forbes | SHOOK

ON-THE-ROAD

The J.W. Marriott, Chicago

Thursday,
December 1, 2022

| TIME | SESSION & SPEAKER |
|---------------|--|
| 12:00-12:10pm | Opening Remarks <ul style="list-style-type: none">— R.J. Shook, Co-Founder & President, SHOOK Research & Senior Forbes Contributor |
| 12:10-12:15pm | SHOOK One's – My Best Idea <ul style="list-style-type: none">— Ted Davis, Morgan Stanley Wealth Management— Lindsey Nacht, Sr. Associate VP, Director of Research, SHOOK Research |
| 12:15-12:35pm | How the Best Become the Best <ul style="list-style-type: none">— Dr. Kevin Elko, Advisor Advancement Institute, New York Life Investments— Kevin Lynch, Morgan Stanley Private Wealth Management— Jonathan DeFreytas, Morgan Stanley Private Wealth Management— Moderator: Cesar Bastida, Director, Advisor Advancement Institute, New York Life Investments— Madison Rizzo, Analyst, SHOOK Research |
| 12:35-12:55pm | Choosing the Right Alternative for an Inflationary Environment <ul style="list-style-type: none">— Frank Cohen, Sr. Managing Director, Blackstone Real Estate— Dan Oneglia, Sr. Managing Director, Blackstone Credit— Moderator: Kathy Roeser, Morgan Stanley Wealth Management— John Bogosian, Principal, Blackstone Private Wealth Solutions |
| 12:55-1:15pm | ARK Invest and the Disruptive Innovation Opportunity <ul style="list-style-type: none">— Frank Downing, Director of Research, Next Generation Internet, ARK Investment Management— Moderator: Ryan Hodapp, Vice President & Product Specialist, ARK Investment Management |
| 1:15-1:25pm | SHOOK One's - My Best Idea <ul style="list-style-type: none">— Nick LoMaglio, UBS Wealth Management |
| 1:25-1:45pm | A Conversation with John McCarthy <ul style="list-style-type: none">— John McCarthy, CEO, Starwood Real Estate Income Trust— JJ Poste, Cohen Financial Management— Dan Onan, Regional Vice President, Starwood Capital |
| 1:45-1:50pm | SHOOK One's – My Best Idea <ul style="list-style-type: none">— Mike Lantz, Lantz Financial |
| 1:50-2:10pm | 2023 Market Outlook: Finding Clarity Amid Complexity <ul style="list-style-type: none">— Mike Arone, Chief Investment Strategist, State Street Global Advisors SPDR ETFs— Moderator: Thomas Ryan, Hedeker Wealth— Troy Page, Regional Consultant, State Street Global Advisors SPDR ETFs |
| 2:10-2:25pm | Break |
| 2:25-2:45pm | Lessons Learned from the Past 10 Years <ul style="list-style-type: none">— Steve Deschene, Director of Client Research, Capital Group, Home of American Funds— Erica Horak, Analyst, SHOOK Research |
| 2:45-3:05pm | Alternatives in your Practice <ul style="list-style-type: none">— Howard Nifoussi, Managing Director, Apollo— Moderator: Tom Tyndorf, Merrill Lynch Private Wealth Management— Morgan Haltiner, Principal, Apollo Global Management |

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3:05-3:10pm

SHOOK One's – My Best Idea

- [Brandon Schlesinger](#), Morgan Stanley Private Wealth Management
- [Callie Almes](#), Sr. Associate VP, Project Leader, SHOOK Research

3:10-3:30pm

Key Growth Strategies for Top Performing Teams

- [George Alessandria](#), Broadway Wealth Management
- [Andy Timmerwilke](#), Merrill Lynch Wealth Management
- Moderator: [Clare Kiesel](#), SVP & National Branch Manager - Linsco, LPL Financial
- [Jordan Merrill](#), Analyst, SHOOK Research

3:30-3:50pm

Building Brand Relevance

- [Mike Fox](#), Founder, The Mullingar Group
- [Andrew Tomson](#), Sr. Investment Consultant, Thornburg

3:50-4:10pm

2022: Making Sense of the Abnormal and Revisiting the Math

- [Paul McGinn](#), Sr. Vice President & Client Portfolio Manager, Fixed-Income Strategy, First Trust
- [LoriAnn LaSalle](#), Sr. Associate VP, Business Manager, SHOOK Research

4:10-4:15pm

Closing Remarks

- [Frank Berland](#), Managing Partner, SHOOK Research

4:15-5:00pm

Cocktail Reception

6:00pm

Dine-arounds with Partners Following