

Forbes | SHOOK  
**ALTERNATIVES**  
SUMMIT  
Pier 60

Monday,  
June 12, 2023

TIME	SESSION & SPEAKER
7:30 a.m.	Registration Opens
7:30 – 9:00am	Breakfast
9:00 – 9:10am	Opening — <a href="#">Frank Berland</a> , Managing Partner, SHOOK Research
9:10 – 9:40am	Outlook and Opportunities in a New Investment Paradigm — <a href="#">Scott Kleinman</a> , Co-President, Apollo Global Management — Moderator: <a href="#">Jerry Pascucci</a> , Head of Global Alternative Investment Solutions, Global Wealth Management, UBS
9:40 – 10:10am	How We Are Allocating — <a href="#">David Berdon</a> , Morgan Stanley Private Wealth Management — <a href="#">Adam Epstein</a> , UBS Private Wealth Management — Moderator: <a href="#">Jonathan Ross</a> , VP, Market Leader & Senior Advisor Consultant, New York Metro, Invesco — Intro: <a href="#">Jamie Shook</a> , Junior Analyst, SHOOK Research & Junior, Wake Forest University
10:10 – 10:40am	Complementary Nature of Real Assets and Credit — <a href="#">David Levi</a> , Head of Brookfield Oaktree Wealth Solutions & CEO of Brookfield Public Securities Group — Moderator: <a href="#">David Katz</a> , Merrill Lynch Wealth Management
10:40 – 11:00am	Snack Break
11:00 – 11:30am	The Time for the “Right” Alts Is Still Now — <a href="#">Troy Gayeski</a> , Chief Market Strategist, FS Investments — Moderator: <a href="#">Ben Segal</a> , UBS Wealth Management — Intro: <a href="#">Laurie Durante</a> , Head of Platform Strategy, Sr. Relationship Manager, FS Investments
11:30am – 12:00pm	Private Markets for Private Wealth — <a href="#">Scott Nuttall</a> , Co-Chief Executive Officer, KKR — Moderator: <a href="#">Mike Gavisier</a> , Managing Director, Morgan Stanley Wealth Management — Intro: <a href="#">Michael Savino</a> , Director, Client & Partner Group, KKR
12:00 – 1:30pm	Lunch
1:30 – 2:00pm	Where Opportunities Lie in Alts — <a href="#">Scott Stackman</a> , UBS Private Wealth Management — <a href="#">Richard Zinman</a> , Morgan Stanley Private Wealth Management — Moderator: <a href="#">Howard Nifoussi</a> , Partner, Apollo Global Management — Intro: <a href="#">Jeremy Shook</a> , Junior Analyst, SHOOK Research & Freshman, Emory University
2:00 – 2:30pm	Private Credit – The Time is Now? — <a href="#">Chris Sullivan</a> , Senior Managing Director, Blackstone Credit — <a href="#">Matt Stewart</a> , Managing Director, Oaktree Capital — Moderator: <a href="#">Vikas Mohindra</a> , Merrill Lynch Wealth Management
2:30 – 3:00pm	An Alternative View From the Top — <a href="#">Jonathan Gray</a> , President and Chief Operating Officer, Blackstone — Moderator: <a href="#">Nancy Fahmy</a> , Head of Investment Solutions Group, Merrill Lynch Wealth Management — Intro: <a href="#">Jeanette Pieper</a> , Managing Director, Blackstone Private Wealth Solutions

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**TIME**

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3:00 – 3:30pm

**Property First, Solutions Second**

- [Bert Crouch](#), Head of North America and Portfolio Manager, Invesco Real Estate
- Moderator: [Jonathan Ross](#), Vice President, Market Leader & Senior Advisor Consultant, New York Metro, Invesco
- Intro: [James Robinson](#), VP & Market Leader, Invesco

3:30 – 4:00pm

**Networking Break**

4:00 – 4:30pm

**Beyond the Boardroom: Rebuilding Capitalism**

- [Melody Hobson](#), Co-CEO & President, Ariel Investments
- Moderator: [Maneet Ahuja](#), Founder & Editor-at-Large, Iconoclast, Forbes

4:30 – 4:55pm

**Power Brokers: The Business of Building Empires**

- [Marc Lasry](#), Cofounder & CEO, Avenue Capital Group
- [Michael Strahan](#), Pro Football Hall of Famer, Broadcaster, and Entrepreneur
- Moderator: [Randall Lane](#), Chief Content Officer, Forbes

4:55 – 5:25pm

**F1 Overdrive: Decoding the DNA of a Legendary Racing Dynasty**

- [Lewis Hamilton](#), Seven-Time Formula 1 World Champion
- [Toto Wolff](#), Co-Owner, CEO and Team Principal of the Mercedes-AMG Petronas F1 Team
- Moderator: [Maneet Ahuja](#), Founder & Editor-at-Large, Iconoclast, Forbes

5:25 – 5:30pm

**Closing Remarks**

- [Maneet Ahuja](#), Founder & Editor-at-Large, Iconoclast, Forbes

5:30 – 6:30pm

**Cocktail Reception**