

Forbes | SHOOK ALTERNATIVES SUMMIT

June 5, 2025 | Convene, NYC

CE Credits: 3.5 CFP | 4 IMCA

TIME	SESSION & SPEAKER
11:00-11:30am	REGISTRATION
11:30-11:35am	Welcome Remarks <ul style="list-style-type: none">• Frank Berland, Managing Partner, SHOOK Research
11:35-11:40am	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• David Berdon, Morgan Stanley Private Wealth Management• <i>Intro: Jacob Shook, Senior Analyst, SHOOK Research</i>
11:40am-12:00pm	All-Weather Strategies: Navigating Private Markets with Confidence <ul style="list-style-type: none">• Bill Bohnsack, President & Senior Partner, OHA• Moderator: Robby Mitchell, Vice President, Alternative Investments Regional Director, Morgan Stanley• <i>Intro: Gabriel Lewis, Vice President, Alternative Investment Specialist, T. Rowe Price</i>
12:00-12:15pm	Infrastructure of the Future <ul style="list-style-type: none">• Sean Klimczak, Global Head of Infrastructure and Chairman of BXINFRA, Blackstone• Moderator: Lora Cooperman, Morgan Stanley Private Wealth Management• <i>Intro: Jeanette Pieper, Managing Director, Blackstone Private Wealth</i>
12:15-12:30pm	Rethinking the 60/40 Portfolio: Navigating Volatility and Embracing Alternatives <ul style="list-style-type: none">• Alexander Wright, Partner, Global Wealth Strategist, Apollo Global Management• <i>Intro: Jonathan Morris, Deputy Head of Sales, GWMS, Apollo Global Management</i>
12:30-12:35pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Shawn Gold, Merrill Wealth Management• <i>Intro: Matt Brancato, Head of Alternative Sales, Franklin Templeton</i>
12:35-12:50pm	Rising Above Market Volatility: Who Will Prevail? <ul style="list-style-type: none">• Milwood Hobbs, Jr., Managing Director and Head of Sourcing & Origination, Oaktree Capital Management• Moderator: Jill Schildkraut-Katz, Morgan Stanley Private Wealth Management
12:50-1:35pm	NETWORKING LUNCH
1:35-1:50pm	Seeking Resilient, Tax-Advantaged Income with Net Lease <ul style="list-style-type: none">• Meghan Donoghue, Principal, Real Assets Portfolio Strategist, Blue Owl• Moderator: Robert Mancino, UBS Wealth Management
1:50-2:05pm	Private Credit: The Importance of Staying Active <ul style="list-style-type: none">• Greg Hall, Managing Director, Head of U.S. Global Wealth Management, PIMCO• Moderator: Todd Forman, Morgan Stanley Private Wealth Management• <i>Intro: Steven Pogorelec, EVP, Western Divisional Sales Manager, U.S. Global Wealth Management, PIMCO</i>
2:05-2:20pm	Investing in Space – the New Frontier <ul style="list-style-type: none">• Daniel Kleinmann, Co-Founder & General Partner, Balerion Space Ventures
2:20-2:35pm	Private Credit at a Crossroads: Navigating Risks, Finding Opportunity <ul style="list-style-type: none">• Jason Breaux, Managing Director, Crescent Capital• Moderator: Tom Klingman, Klingman & Associates

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2:35-2:50pm	Today's Evolving Real Estate Market <ul style="list-style-type: none">• Bert Crouch, Managing Director & Portfolio Manager, Invesco Real Estate• Moderator: Jonathan Ross, VP, Market Leader & Senior Advisor Consultant, New York Metro, Invesco
2:50-2:55pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• David Katz, Merrill Wealth Management• <i>Intro: Laurie Durante, Head of Platform Strategy & Senior Relationship Manager, FS Investments</i>
2:55-3:15pm	Private Credit: Past, Present and Future <ul style="list-style-type: none">• Richard Jacobson, Managing Director, Golub Capital• John Christmas, Co-Head of Business Development, HPS Investment Partners• Moderator: Keith Fortmiller, Investment Officer for Private Credit and Real Assets, Morgan Stanley Wealth Management
3:15-3:30pm	Private Equity Opportunities: Navigating Selection & Strategy in a Shifting Market <ul style="list-style-type: none">• Robert Picard, Head of Alternative Investments, Hightower• Ashmi Mehrotra, Global Co-Head of Private Equity Group, J.P. Morgan Asset Management• Moderator: Shawn Khazzam, Managing Director, Head of Private Wealth Alternatives, Americas, J.P. Morgan Asset Management
3:30-3:35pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• James Hofmann, Wells Fargo Advisors• <i>Intro: Brian D'Anna, Director, Private Wealth Americas, Golub Capital</i>
3:35-3:55pm	Why Secondaries: Unlocking Liquidity, Reducing Risk, and Accelerating Returns <ul style="list-style-type: none">• Taylor Robinson, Partner, Lexington Partners• Patrick Gerbracht, Co-Head LP Secondaries, FS Investments• Moderator: Michael Jawien, Morgan Stanley Wealth Management• <i>Intro: Jenny DeSeno, Associate VP Project Leader, SHOOK Research</i>
3:55-4:00pm	The Last Word <ul style="list-style-type: none">• Lindsey Nacht, Vice President Director of Operations, SHOOK Research
4:00-5:00pm	Cocktail Reception hosted by T. Rowe Price Oak Hill Advisors