

Forbes | SHOOK ON THE ROAD

The Maybourne Beverly Hills

November 20, 2025

TIME

11:00 – 11:10am

SESSION & SPEAKER

Raising Your Team's Percentile

- **R.J. Shook**, Co-Founder & President, SHOOK Research & Senior Forbes Contributor

11:10 – 11:15am

SHOOK Ones: What's Your Hourly Rate?

- **Nicholas Ciriello**, RBC Wealth Management
- *Intro: **Madison Rizzo**, Associate VP | Partnerships, SHOOK Research*

11:15 – 11:35pm

Private Markets Outlook

- **Anastasia Amoroso**, Chief Investment Strategist, Partners Group
- *Intro: **Mike Nuss**, Senior Client Relationship Manager, Partners Group*

11:35 – 11:55am

Seeking Attractive Risk-Adjusted Returns Across Cycles with Direct Lending

- **Treavor Mosbough**, Principal, Senior Market Leader, Blue Owl

11:55am – 12:00pm

SHOOK Ones: Engaging With COI's to Support and Grow Your Practice

- **Karin Longhurst**, Morgan Stanley Private Wealth Management
- *Intro: **Jacob Shook**, Senior Analyst | Next-Gen Lead, SHOOK Research*

12:00 – 12:20pm

Ideas from the Masters List

- **Marc Ackerman**, IFC Advisors
- **Francois Viljoen**, IFC Advisors
- Moderator: **Nick Cirbo**, VP, Market Leader, Invesco

12:20 – 12:40pm

Private Equity in Focus: Identifying Bespoke Opportunities and Developing Unique Partnerships

- **Michael Woolhouse**, Co-Managing Partner, TPG GP Solutions
- Moderator: **Jimmy Klein**, Morgan Stanley Private Wealth Management
- *Intro: **Max Stegner**, Vice President, TPG*

12:40 – 1:10pm

Networking Lunch Break

1:10 – 1:15pm

SHOOK Ones: How We're Attacking "The Great Wealth Transfer" with Multigenerational Planning

- **Perry Richards**, Merrill Wealth Management
- *Intro: **Kaili Moran**, Planning Coordinator | Event Associate, SHOOK Research*

1:15 – 1:35pm

Five Considerations

- **Gibson Smith**, Founder, Smith Capital Investors

1:35 – 1:55pm

Unlocking Opportunities in Private Equity

- **Steve Cook**, Managing Director, Blackstone Private Equity Group
- Moderator: **Bill Tugurian**, Managing Director, Blackstone Private Wealth Solutions

1:55 – 2:15pm

Market Outlook: Position for Policy Pivots

- **Michael Arone**, Chief Investment Strategist, State Street Investment Management
- Moderator: **Joseph Schirripa**, UBS Wealth Management
- *Intro: **Darius Tandy**, Regional Consultant, State Street Investment Management*

2:15 – 2:35pm

The Pace of Change Has Never Been Greater & It Will Likely Never Be This Slow Again

- **Denny Fish**, Portfolio Manager | Research Analyst, Janus Henderson Investors
- Moderator: **Richard Jones**, Merrill Private Wealth Management
- *Intro: **Bill Kennedy**, Executive Director, Advisor Solutions Group, Janus Henderson Investors*

2:35 – 2:55pm

Redefining Value Investing with Investigative Research

- **Cynthia Chamberlayne**, Senior Investment Strategist - Advisor Enablement, BNY Investments
- *Intro: **Scott Silverman**, SVP, Advisor Solutions Group, BNY Investments*

2:55 – 3:15pm

Staying Ahead of the Curve-Market Thoughts from PIMCO

- **Joshua Anderson**, Portfolio Manager, Asset-Backed Securities, PIMCO
- Moderator: **Alex Shahidi**, Evoke Advisors
- *Intro: **Antonese Robertson**, Vice President, Account Manager, PIMCO*

3:15 – 3:35pm

Top Teams - How We Are Achieving Growth

- **Patrick Schaffer**, UBS Private Wealth Management
- **Brandon Bernstein**, Wells Fargo Advisors
- Moderator: **Krista Goryl**, Western Division Growth Director, Wells Fargo Advisors

3:35 – 3:45pm

The Last Word

- **Frank Berland**, Managing Partner, SHOOK Research

3:45 – 4:45pm

Cocktails