

Forbes | SHOOK ON THE ROAD

September 9, 2025 | JW Marriott

CE Credits

TIME

11:30am	SESSION & SPEAKER
12:00-12:10pm	REGISTRATION
12:10-12:15pm	Raising Your Team's Percentile <ul style="list-style-type: none">• R.J. Shook, Co-Founder & President, SHOOK Research & Senior Forbes Contributor
12:15-12:35pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Sarah Damsgaard, Graystone Consulting from Morgan Stanley• <i>Intro: Lindsey Nacht, Vice President / Director of Operations, SHOOK Research</i> Optimizing Private Credit: Where Strategy Meets Manager Edge <ul style="list-style-type: none">• Andrew Winer, Managing Director, Chief Operating Officer – Registered Funds, OHA• Moderator: Kevin Lynch, Morgan Stanley Private Wealth Management• <i>Intro: Gabe Lewis, Alternative Investment Specialist, T. Rowe Price</i>
12:35-12:55pm	The Good, The Bad, and The Uncertain: Investing Through Macro Inflections and Private Market Transformation <ul style="list-style-type: none">• Anastasia Amoroso, Chief Investment Strategist, Partners Group
12:55-1:15pm	Ideas from The Masters List <ul style="list-style-type: none">• Sharon Oberlander, Merrill Wealth Management• Moderator: Wayne Badorf, Managing Director, Consulting Strategy and Execution, Invesco Global Consulting
1:15-1:20pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Benjamin Leshem, HLM Capital• <i>Intro: Jacob Shook, Senior Analyst, SHOOK Research</i>
1:20-1:40pm	Unlocking Opportunities with Private Equity <ul style="list-style-type: none">• Viral Patel, Chief Executive Officer, Blackstone Private Equity Strategies
1:40-1:55pm	NETWORKING BREAK
1:55-2:00pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• AJ Johri, Morgan Stanley Wealth Management• <i>Intro: Madison Rizzo, Associate VP / Partnerships, SHOOK Research</i>
2:00-2:20pm	A Discussion on Private Credit Markets <ul style="list-style-type: none">• John Christmas, Co-Head of Business Development & Investor Relations, HPS Investment Partners• Moderator: Joseph Silich, Morgan Stanley Wealth Management• <i>Intro: Dimitri Loupakos, Executive Director, HPS Investment Partners</i>
2:20-2:40pm	Capitalizing on Growing Opportunities in Real Assets <ul style="list-style-type: none">• Meghan Donoghue, Principal, Real Assets Portfolio Strategist, Blue Owl• Moderator: Nicole Klotz, Principal, Blue Owl Capital
2:40-3:00pm	Market Outlook: A Market in Suspense <ul style="list-style-type: none">• Michael Arone, Chief Investment Strategist, State Street Investment Management• Moderator: Andy Timmerwilke, Merrill Wealth Management

Forbes | SHOOK ON THE ROAD

September 9, 2025 | JW Marriott

CE Credits

3:00-3:20pm

Navigating Securitized Markets

- **Nick Childs**, Head of Structured and Quantitative Fixed Income, Portfolio Manager, Janus Henderson Investors
- Moderator: **William Lymangood**, Morgan Stanley Wealth Management
- *Intro: Jonathan Root, Executive Director, Advisor Solutions Group, Janus Henderson Investors*

3:20-3:40pm

International Growth Opportunities

3:40-4:00pm

Enhancing Client Portfolios with Alternative Investments

- **Darby Nielson**, Chief Investment Officer, Fidelity Institutional Wealth Adviser
- Moderator: **Russell McLean**, The McLean Wealth Management Group | Wells Fargo Financial Network
- *Intro: Bo Kreiling, Regional Director, Fidelity Investments*

4:00-4:05pm

SHOOK Ones: My Best Idea

- **James Murphy**, Merrill Wealth Management
- *Intro: Erick Lopez, Associate VP | Research, SHOOK Research*

4:05-4:25pm

Navigating the Space & Defense Tech Market for Financial Advisors

4:25-4:30pm

The Last Word

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

4:30-5:30pm

Cocktail Reception