

# Forbes | SHOOK

## ON THE ROAD

Kimpton Epic Miami

#ForbesSHOOKTopAdvisor

December 10, 2025

TIME	SESSION & SPEAKER
12:00 – 12:15pm	<b>Raising Your Team's Percentile</b> <ul style="list-style-type: none"><li>• <b>R.J. Shook</b>, Co-Founder &amp; CEO, SHOOK Research &amp; Senior Forbes Contributor</li></ul>
12:15 – 12:20pm	<b>SHOOK Ones: How to Use AI to Organize, Scale, and Streamline Your Practice</b> <ul style="list-style-type: none"><li>• <b>Gregory Steinmetz</b>, Morgan Stanley Wealth Management</li><li>• <i>Intro: Jacob Shook, Senior Analyst / Next-Gen Lead, SHOOK Research</i></li></ul>
12:20 – 12:40pm	<b>Market Outlook: Uncomfortably Bullish</b> <ul style="list-style-type: none"><li>• <b>Michael Arone</b>, Chief Investment Strategist, State Street Investment Management</li><li>• Moderator: <b>John Foreman</b>, Morgan Stanley Wealth Management</li><li>• <i>Intro: Michael McIlravy, Divisional Director, State Street Investment Management</i></li></ul>
12:40 – 1:00pm	<b>Building Portfolios with Direct Lending for Income and Capital Preservation</b> <ul style="list-style-type: none"><li>• <b>Katie Fowler</b>, Principal, Direct Lending Portfolio Strategist, Blue Owl</li></ul>
1:00 – 1:20pm	<b>Today's Evolving Real Estate Market</b> <ul style="list-style-type: none"><li>• <b>John Manley</b>, Principal, Blackstone Real Estate</li><li>• Moderator: <b>Joe Jordan</b>, Principal, Blackstone Private Wealth</li></ul>
1:20 – 1:25pm	<b>SHOOK Ones: Ideas Around Team Offsites</b> <ul style="list-style-type: none"><li>• <b>Michael Silver</b>, Baron Silver Stevens Financial Advisors</li><li>• <i>Intro: Erica Horak, Associate VP, Honors and Recognition, SHOOK Research</i></li></ul>
1:25 – 1:45pm	<b>Redefining Value Investing with Investigative Research</b> <ul style="list-style-type: none"><li>• <b>Cynthia Chamberlayne</b>, Senior Investment Strategist - Advisor Enablement, BNY Investments</li><li>• <i>Intro: Michael Hurley, Senior Investment Consultant, BNY Investments</i></li></ul>
1:45 – 2:05pm	<b>Networking Break</b>
2:05 – 2:10pm	<b>SHOOK Ones: Growing Your Business with PR and Social Media</b> <ul style="list-style-type: none"><li>• <b>Eric Diton</b>, The Wealth Alliance</li><li>• <i>Intro: Ann Hall, Senior Analyst, SHOOK Research</i></li></ul>
2:10 – 2:30pm	<b>Ideas from the Masters List</b> <ul style="list-style-type: none"><li>• <b>Andrew Lerner</b>, Ameriprise Financial Services</li><li>• <b>Matthew Poser</b>, Morgan Stanley Wealth Management</li><li>• Moderator: <b>Derek Witte</b>, VP, Market Leader, Invesco</li></ul>
2:30 – 2:50pm	<b>Keep Calm and Bond On</b> <ul style="list-style-type: none"><li>• <b>Jeff Johnson</b>, Vice President   Fixed Income Client Portfolio Manager, First Trust</li></ul>
2:50 – 3:10pm	<b>Private Equity in Focus: Identifying Bespoke Opportunities and Developing Unique Partnerships</b> <ul style="list-style-type: none"><li>• <b>Michael Woolhouse</b>, Co-Managing Partner, TPG GP Solutions</li><li>• Moderator: <b>David Berdon</b>, Morgan Stanley Private Wealth Management</li><li>• <i>Intro: Colin Morris, Principal, Head of SE PWM Distribution, TPG</i></li></ul>
3:10 – 3:30pm	<b>Executing an Exceptional Client Service Model</b> <ul style="list-style-type: none"><li>• <b>Andrew Schultz</b>, Morgan Stanley Private Wealth Management</li><li>• <b>Lisa Van Walleghem</b>, MAXIMAI Investment Partners</li><li>• Moderator: <b>Pat Renehan</b>, Vice President, Regional Consultant, State Street Investment Management</li></ul>
3:30 – 3:50pm	<b>Top Teams - How We Are Achieving Growth</b> <ul style="list-style-type: none"><li>• <b>Michael Beckerman</b>, Merrill Private Wealth Management</li><li>• <b>Joseph Fezza</b>, Morgan Stanley Wealth Management</li><li>• Moderator: <b>Michael Hurley</b>, Senior Investment Consultant, BNY Investments</li></ul>
3:50 – 4:00pm	<b>The Last Word</b> <ul style="list-style-type: none"><li>• <b>Frank Berland</b>, Managing Partner, SHOOK Research</li></ul>
4:00 – 5:00pm	<b>Cocktails</b>