

# Forbes | SHOOK ON THE ROAD

Kimpton Epic Miami

#ForbesSHOOKTopAdvisor

December 10, 2025

## TIME

12:00 – 12:15pm

## SESSION & SPEAKER

### Raising Your Team's Percentile

- [R.J. Shook](#), Co-Founder & CEO, SHOOK Research & Senior Forbes Contributor

12:15 – 12:20pm

### SHOOK Ones: How to Use AI to Organize, Scale, and Streamline Your Practice

- [Gregory Steinmetz](#), Morgan Stanley Wealth Management
- *Intro: [Jacob Shook](#), Senior Analyst / Next-Gen Lead, SHOOK Research*

12:20 – 12:40pm

### Market Outlook: Uncomfortably Bullish

- [Michael Arone](#), Chief Investment Strategist, State Street Investment Management
- Moderator: [John Foreman](#), Morgan Stanley Wealth Management
- *Intro: [Michael Mollravy](#), Divisional Director, State Street Investment Management*

12:40 – 1:00pm

### Building Portfolios with Direct Lending for Income and Capital Preservation

- [Katie Fowler](#), Principal, Direct Lending Portfolio Strategist, Blue Owl

1:00 – 1:20pm

### Today's Evolving Real Estate Market

- [John Manley](#), Principal, Blackstone Real Estate
- Moderator: [Joe Jordan](#), Principal, Blackstone Private Wealth

1:20 – 1:25pm

### SHOOK Ones: Ideas Around Team Offsites

- [Michael Silver](#), Baron Silver Stevens Financial Advisors
- *Intro: [Erica Horak](#), Associate VP, Honors and Recognition, SHOOK Research*

1:25 – 1:45pm

### Redefining Value Investing with Investigative Research

- [Cynthia Chamberlayne](#), Senior Investment Strategist - Advisor Enablement, BNY Investments
- *Intro: [Michael Hurley](#), Senior Investment Consultant, BNY Investments*

1:45 – 2:05pm

### Networking Break

2:05 – 2:10pm

### SHOOK Ones: Growing Your Business with PR and Social Media

- [Eric Diton](#), The Wealth Alliance
- *Intro: [Ann Hall](#), Senior Analyst, SHOOK Research*

2:10 – 2:30pm

### Ideas from the Masters List

- [Andrew Lerner](#), Ameriprise Financial Services
- [Matthew Poser](#), Morgan Stanley Wealth Management
- Moderator: [Derek Witte](#), VP, Market Leader, Invesco

2:30 – 2:50pm

### Keep Calm and Bond On

- [Jeff Johnson](#), Vice President | Fixed Income Client Portfolio Manager, First Trust

2:50 – 3:10pm

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

- [Michael Woolhouse](#), Co-Managing Partner, TPG GP Solutions
- Moderator: [David Berdon](#), Morgan Stanley Private Wealth Management
- *Intro: [Colin Morris](#), Principal, Head of SE PWM Distribution, TPG*

3:10 – 3:30pm

### Executing an Exceptional Client Service Model

- [Andrew Schultz](#), Morgan Stanley Private Wealth Management
- [Lisa Van Wallegghem](#), MAXIMAI Investment Partners
- Moderator: [Pat Renehan](#), Vice President, Regional Consultant, State Street Investment Management

3:30 – 3:50pm

### Top Teams - How We Are Achieving Growth

- [Michael Beckerman](#), Merrill Private Wealth Management
- [Joseph Fezza](#), Morgan Stanley Wealth Management
- Moderator: [Michael Hurley](#), Senior Investment Consultant, BNY Investments

3:50 – 4:00pm

### The Last Word

- [Frank Berland](#), Managing Partner, SHOOK Research

4:00 – 5:00pm

### Cocktails