

# Forbes | SHOOK ON THE ROAD

NY Hilton Midtown

#ForbesSHOOK

Thursday, March 20, 2025

TIME	SESSION & SPEAKER
12:00 – 12:10pm	<b>The Infinite Team</b> <ul style="list-style-type: none"><li>• <b>R.J. Shook</b>, Co-Founder &amp; President, SHOOK Research &amp; Senior Forbes Contributor</li></ul>
12:10 – 12:15pm	<b>SHOOK Ones: My Best Idea</b> <ul style="list-style-type: none"><li>• <b>Frank Delli Carpini</b>, Morgan Stanley Wealth Management</li><li>• <i>Intro: <b>Jacob Shook</b>, Senior Analyst, SHOOK Research</i></li></ul>
12:15 – 12:35pm	<b>Ideas from the Winner's Circle</b> <ul style="list-style-type: none"><li>• <b>Edmund Agresta</b>, Morgan Stanley Wealth Management</li><li>• Moderator: <b>Jay Therrien</b>, Managing Director of Executive Consulting, Invesco Global Consulting</li><li>• <i>Intro: <b>Jim Barker</b>, Vice President, Market Leader, Senior Advisor Consultant, Invesco</i></li></ul>
12:35 – 12:55pm	<b>Unlocking Opportunities With Private Equity</b> <ul style="list-style-type: none"><li>• <b>Viral Patel</b>, Chief Executive Officer, Blackstone Private Equity Strategies</li><li>• Moderator: <b>Eddie Bernson</b>, Principal, Blackstone Private Wealth Solutions</li></ul>
12:55 – 1:15pm	<b>Not All Private Credit Is Created Equal: Identifying Key Differentiators That Really Matter</b> <ul style="list-style-type: none"><li>• <b>Randy Schwimmer</b>, Vice Chairman, Investor Solutions, Churchill Asset Management</li><li>• Moderator: <b>Ron Insana</b>, Senior Analyst for CNBC</li><li>• <i>Intro: <b>Dave Flaherty</b>, Managing Director, Market Leader – Garden State, Nuveen</i></li></ul>
1:15 – 1:20pm	<b>SHOOK Ones: My Best Idea</b> <ul style="list-style-type: none"><li>• <b>Anthony Shropshire</b>, Merrill Wealth Management</li><li>• <i>Intro: <b>Jordan Merrill</b>, Associate VP   Research Manager, SHOOK Research</i></li></ul>
1:20 – 1:40pm	<b>Exploring a Growing Opportunity Set in Real Assets</b> <ul style="list-style-type: none"><li>• <b>Jesse Hom</b>, Senior Managing Director &amp; Chief Investment Officer of Real Assets, Head of Real Estate Credit, Blue Owl</li><li>• Moderator: <b>Meghan Donoghue</b>, Principal, Real Assets Portfolio Strategist, Blue Owl</li></ul>
1:40 – 1:55pm	<b>Networking Break Presented by Our Premier Partner, Invesco QQQ</b>
1:55 – 2:15pm	<b>2025 ETF Market Outlook: Soft Landings and Bull Markets</b> <ul style="list-style-type: none"><li>• <b>Michael Arone</b>, Chief Investment Strategist, State Street Global Advisors</li><li>• Moderator: <b>Robert Chen</b>, Morgan Stanley Private Wealth Management</li><li>• <i>Intro: <b>John Faron</b>, VP &amp; Regional Consultant - NYC, State Street Global Advisors</i></li></ul>
2:15 – 2:20pm	<b>SHOOK Ones: My Best Idea</b> <ul style="list-style-type: none"><li>• <b>Suzanne Akian</b>, Morgan Stanley Wealth Management</li><li>• <i>Intro: <b>Lindsey Nacht</b>, Vice President   Director of Operations, SHOOK Research</i></li></ul>
2:20 – 2:40pm	<b>Growing Investment Opportunities Within Sports, Media, and Entertainment</b> <ul style="list-style-type: none"><li>• <b>Mark Affolter</b>, Co-Head of Ares Sports, Media, and Entertainment Opportunities and Co-Head of U.S. Direct Lending</li><li>• Moderator: <b>Liz Jones</b>, Head of Ares Private Wealth Partnerships</li></ul>
2:40 – 2:55pm	<b>Opportunities When Historically Confident Investors Confront Record Uncertainty</b> <ul style="list-style-type: none"><li>• <b>Richard Bernstein</b>, CEO &amp; CIO, Richard Bernstein Advisors</li><li>• <i>Intro: <b>George Stanevich</b>, Executive Director, Advisor Solutions Group, Janus Henderson Investors</i></li></ul>
2:55 – 3:10pm	<b>Allocating to Fixed Income: It's Not If, But Where</b> <ul style="list-style-type: none"><li>• <b>Nick Childs</b>, Head of Structured &amp; Quantitative Fixed Income, Portfolio Manager, Janus Henderson Investors</li><li>• <i>Intro: <b>Rocco Scanniello</b>, Executive Director, Advisor Solutions Group, Janus Henderson Investors</i></li></ul>

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3:10 – 3:25pm

## **Riding the Real Estate Recovery**

- **Donald Hall**, Portfolio Manager, U.S. Cities Diversified Strategy & Global Head of Research, Nuveen Real Estate
- Moderator: **Jill Bobigan**, UBS Wealth Management

3:25 – 3:40pm

## **Fed Policy and Muni Market Impact**

- **Jonathan Wilhelm**, Senior Vice President, Senior Portfolio Manager, First Trust
- Moderator: **Tom Klingman**, Klingman & Associates

3:40 – 4:00pm

## **The Evolution of ETF Investing**

- **Craig Ebeling**, Vice President, ETF Strategist, Fidelity Investments
- Moderator: **Ron Insana**, Senior Analyst for CNBC
- *Intro: David Harvey, Regional Director, Fidelity Investments*

4:00 – 4:10pm

## **The Last Word**

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

4:10 – 5:10pm

## **Cocktail Reception Hosted by Nuveen**