

Forbes | SHOOK ON THE ROAD

The Merchants Exchange – Julia Morgan Ballroom
San Francisco

#ForbesSHOOK

November 18, 2025

TIME	SESSION & SPEAKER
11:00 – 11:10am	Raising Your Team's Percentile <ul style="list-style-type: none">• R.J. Shook, Co-Founder & President, SHOOK Research & Senior Forbes Contributor
11:10 – 11:15am	SHOOK Ones: Ideas Around Growing Your Practice <ul style="list-style-type: none">• Adrienne Yamaki, Strategic Wealth Capital• <i>Intro: Jacob Shook, Senior Analyst / Next-Gen Lead, SHOOK Research</i>
11:15 – 11:35pm	Unlocking Opportunities in Private Equity <ul style="list-style-type: none">• Steve Cook, Managing Director, Blackstone Private Equity Group• Moderator: Michael LaVita, Principal, Blackstone Private Wealth Solutions
11:35 – 11:55am	Market Outlook: Position for Policy Pivots <ul style="list-style-type: none">• Michael Arone, Chief Investment Strategist, State Street Investment Management• Moderator: Mike Krigel, Morgan Stanley Wealth Management• <i>Intro: Ryan O'Carroll, Western Divisional Manager, State Street Investment Management</i>
11:55am – 12:15pm	Five Considerations <ul style="list-style-type: none">• Gibson Smith, Founder, Smith Capital Investors
12:15 – 12:20pm	SHOOK Ones: Financial Planning for Special Needs <ul style="list-style-type: none">• Darryl Ng, Morgan Stanley Wealth Management• <i>Intro: Lindsey Nacht, Vice President / Director of Operations, SHOOK Research</i>
12:20 – 12:40pm	Ideas from the Masters List <ul style="list-style-type: none">• Ash Chopra, Syon Capital• Moderator: Mason Billock, VP, Market Leader, Invesco
12:40 – 1:10pm	Networking Lunch Break
1:10 – 1:30pm	Redefining Value Investing with Investigative Research <ul style="list-style-type: none">• Cynthia Chamberlayne, Senior Investment Strategist - Advisor Enablement, BNY Investments• <i>Intro: Carolyn Lis, SVP, Regional Investment Consultant, BNY Investments</i>
1:30 – 1:35pm	SHOOK Ones: Empowering Your Team for Growth <ul style="list-style-type: none">• Sandra Wang, Morgan Stanley Wealth Management• <i>Intro: Luke Bartow, Associate VP / Event Programming, SHOOK Research</i>
1:35 – 1:55pm	Private Equity in Focus: Identifying Bespoke Opportunities and Developing Unique Partnerships <ul style="list-style-type: none">• Michael Woolhouse, Co-Managing Partner, TPG GP Solutions• Moderator: Robert Vaughan, Morgan Stanley Private Wealth Management• <i>Intro: Matt Sekera, Managing Director, TPG</i>
1:55 – 2:15pm	Seeking Attractive Risk-Adjusted Returns Across Cycles with Direct Lending <ul style="list-style-type: none">• Christian Sabbagh, Vice President, Direct Lending Portfolio Strategist, Blue Owl• Moderator: Peter DiDominicis, Principal, Senior Market Leader, Blue Owl
2:15 – 2:35pm	Top Teams - How We Are Achieving Growth <ul style="list-style-type: none">• Thomas Van Dyck, RBC Wealth Management• Ylisa Sanford, Morgan Stanley Wealth Management• Moderator: Mike Rose, VP, Regional Consultant, State Street Investment Management
2:35 – 2:55pm	Tomorrow Today: Investing in Space - The Rise of the Final Frontier <ul style="list-style-type: none">• Patrick Haddox, CEO, Samara Aerospace• Moderator: Aidan Daoussis, Senior Associate, Balerion Space Ventures
2:55 – 3:00pm	The Last Word <ul style="list-style-type: none">• Frank Berland, Managing Partner, SHOOK Research
3:00 – 4:00pm	Cocktails