

Forbes | SHOOK TOP WOMEN ADVISOR SUMMIT

WEDNESDAY, MAY 14, 2025

TIME	SESSION & SPEAKER	LOCATION
3:30-6:00pm	REGISTRATION	REGISTRATION HALL
5:00-6:00pm	WELCOME RECEPTION	OCEAN BALLROOM & FLAGLER HALL
6:30pm	GALA DINNER	GRAND BALLROOM
6:45pm	Welcome to Our Special Event <ul style="list-style-type: none"> Liz Shook, COO & Co-Founder, SHOOK Research 	
6:55pm	Soft Serve <ul style="list-style-type: none"> R.J. Shook, Co-Founder & President, SHOOK Research, Senior Forbes Contributor 	
7:10pm	Session TBD	

THURSDAY, MAY 15, 2025

7:00am – 4:00pm	REGISTRATION	REGISTRATION HALL
8:00 – 8:05am	Coffee with Lizzy <ul style="list-style-type: none"> Liz Shook, COO & Co-Founder, SHOOK Research 	
8:05 – 8:15am	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> Moderator: Eric Schimpf, President and Co-Head, Merrill Wealth Management 	
8:15 – 8:35am	Cutting Through the Clamor in Today's Markets <ul style="list-style-type: none"> Emily Roland, Co-Chief Investment Strategist, John Hancock Investment Management Moderator: Nancy Daoud, Ameriprise Financial Services Intro: Andrew McFetridge, Head of Strategic Relationships & Investment Specialists, John Hancock Investment Management 	
8:35 – 8:40am	SHOOK Ones: My Best Idea	
8:40 – 9:00am	Why She Chooses You – Women, Wealth, and Wisdom <ul style="list-style-type: none"> Jeannie Underwood-Kotner, Senior Vice President & Head of Global Atlantic Consulting, Global Atlantic Financial Group 	
9:00 – 9:20am	Standing Strong with Susan G. Komen	
9:20 – 9:35am	REFRESHMENT BREAK	FLAGLER HALL
9:35 – 9:55am	Logistics Real Estate: Continued Outperformance Amid Tariffs, Inflation & Market Volatility <ul style="list-style-type: none"> Julie Solomon, Co-Head of Ares Global Real Estate Moderator: Liz Jones, Head of Ares Private Wealth Partnerships 	GRAND BALLROOM
9:55 – 10:00am	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> Heather Goodbody, Merrill Private Wealth Management Intro: Jacob Shook, Senior Analyst, SHOOK Research 	

Forbes | SHOOK TOP WOMEN ADVISOR SUMMIT

10:00 – 10:20am	Engaging with Your Clients During Uncertainty <ul style="list-style-type: none"> • Mary Mullin, Merrill Wealth Management • Bonnie Mitten, Morgan Stanley Wealth Management • Moderator: Allison Bonds Mazza, Head of Intermediary, State Street Global Advisors • <i>Intro: Madison Rizzo, Associate VP Partnerships, SHOOK Research</i> 	
10:20 – 10:40am	Today's Evolving Real Estate Market <ul style="list-style-type: none"> • Wesley LePatner, Global Head of Blackstone Core+ Real Estate, CEO of BREIT • Andy Drasites, Senior Managing Director, Blackstone Real Estate • Moderator: Wendy Holmes, UBS Private Wealth Management • <i>Intro: Jeanette Pieper, Managing Director, Blackstone Private Wealth</i> 	
10:40 – 10:50am	SHOOK Ones: My Best Idea	
10:50 – 11:10am	Thoughts for Advisors, Teams, and Clients <ul style="list-style-type: none"> • Moderator: John Nersesian, Head of Advisor Education, PIMCO 	
11:10am – 11:25pm	SNACK BREAK	FLAGLER HALL
11:25am – 12:25pm	ROUNDTABLES – PLAZA I, OCEAN I, OCEAN II, OCEAN FRONT LAWN <i>*PLEASE REFER TO THE BACK OF YOUR BADGE FOR YOUR ROOM ASSIGNMENT*</i>	
12:25pm	LUNCH	GRAND BALLROOM
12:30 – 12:35pm	Forbes SHOOK Directory Exclusive Offer	
12:35 – 12:40pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Lisa Wolf, Morgan Stanley Private Wealth Management • <i>Intro: Callie Askins, Senior Associate VP Project Leader, SHOOK Research</i> 	
12:55 – 1:15pm	From Headwinds to Tailwinds: Why Real Estate Deserves a Closer Look <ul style="list-style-type: none"> • Julia Butler, Managing Director, CEO of KKR Real Estate Select Trust 	
1:15 – 1:35pm	Direct Indexing: Unlock Strategies to Turn Market Volatility into Opportunity <ul style="list-style-type: none"> • Brian Jacobs, Head of Client Portfolio Management, PGIM Custom Harvest, PGIM Investments 	
1:35 – 1:50pm	Luxury Travel and Experiences <ul style="list-style-type: none"> • Moderator: Michael Solomon, Forbes Life Editor 	
1:50 – 2:05pm	REFRESHMENT BREAK	FLAGLER HALL
2:05 – 2:25pm	Private Credit: Capitalizing on a Growing Opportunity <ul style="list-style-type: none"> • Nicole Drapkin, Senior Managing Director, Direct Lending Investment Team, Blue Owl 	GRAND BALLROOM
2:25 – 2:30pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • <i>Intro: Jordan Merrill, Associate VP Research Manager, SHOOK Research</i> 	
2:30 – 2:50pm	How to Position Portfolios in the Second Half of 2025 <ul style="list-style-type: none"> • Mary Ann Bartels, Chief Investment Strategist, Sanctuary Wealth • Richard Bernstein, CEO & CIO, Richard Bernstein Advisors • Moderator: Lexie Head, Mercer Wealth Management Sanctuary Wealth • <i>Intro: Marisa Calderon, Associate, Advisor Solutions Group, Janus Henderson Investors</i> 	

Forbes | SHOOK TOP WOMEN ADVISOR SUMMIT

2:50 – 3:10pm	Rethinking Safe Havens – A CIO’s Perspective on the Evolving Role of Alternatives <ul style="list-style-type: none"> • Beth Anne Byrne, SVP, Investment Specialist, Liquid Alternatives, FS Investments • Cameron Dawson, NewEdge Wealth • <i>Intro: Kirsten Pickens, Co-Head of U.S. Distribution, FS Investments</i> 	
3:10 – 3:15pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Carrie Coghill, Coghill Investment Strategies • <i>Intro: LoriAnn LaSalle, Vice President Business Manager, SHOOK Research</i> 	
3:15 – 3:35pm	Private Equity in Focus: Identifying Bespoke Opportunities and Developing Unique Partnerships <ul style="list-style-type: none"> • Katherine Wood, Partner, TPG Capital • Moderator: Prachi Makkar, Vice President, TPG • <i>Intro: Alexandra Heinicka, Vice President, TPG</i> 	
3:35 – 3:50pm	SNACK BREAK	FLAGLER HALL
3:50 – 4:05pm	Developing Your Go-To Market Strategy for the Business Owner Client Segment <ul style="list-style-type: none"> • Moderator: Katie McKay, Head of Global Retail Distribution Enablement, Manulife John Hancock Investments 	GRAND BALLROOM
4:05 – 4:15pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Teri Kelley, Morgan Stanley Wealth Management • Moderator: Lindsay Starr, Managing Director, Head of Strategic Client Management, Morgan Stanley • <i>Intro: Kaili Moran, Planning Coordinator Event Associate, SHOOK Research</i> 	
4:15 – 4:30pm	Private vs. Public Markets in an Ever-Changing Global Economy <ul style="list-style-type: none"> • Suzanne Donohoe, Chief Commercial Officer & Global Head of EQT-Ext • Moderator: Anna Winderbaum, Morgan Stanley Private Wealth Management 	
4:30 – 4:50pm	Ideas from the Winner’s Circle® <ul style="list-style-type: none"> • Colleen O’Callaghan, J.P. Morgan Wealth Management • Moderator: Lisa Kueng, Managing Director of Business Development, Invesco Global Consulting • <i>Intro: Caroline Carley, Vice President, Market Leader, Invesco</i> 	
4:50 – 5:20pm	SHOOK® Best Idea Competition <ul style="list-style-type: none"> • Liz Shook, COO & Co-Founder, SHOOK Research • Frank Berland, Managing Partner, SHOOK Research • Judge: Heather Hunt-Ruddy, Senior Managing Director, Central Division President, Wells Fargo Advisors • Judge: John Rahal, Edward Jones Generations, Private Wealth 	
5:20 – 5:25pm	Let’s Get Cocktails! <ul style="list-style-type: none"> • Frank Berland, Managing Partner, SHOOK Research 	
FRIDAY, MAY 16, 2025		
8:00 – 9:00am	BREAKFAST	FLAGLER HALL
9:00 – 9:05am	Good Morning...More Coffee Please! <ul style="list-style-type: none"> • Liz Shook, COO & Co-Founder, SHOOK Research 	GRAND BALLROOM



Forbes | SHOOK TOP WOMEN ADVISOR SUMMIT

- 9:05 – 9:25am **Future of Asset Management: Customization, Innovation, and Opportunity**
- **Jenny Johnson**, President & CEO, Franklin Templeton
 - Moderator: **Caroline Gundeck**, Managing Director, Head of PWM Client and Field Engagement, Morgan Stanley Wealth Management
 - Intro: **Candice Kemeny**, SVP, National Account Manager, U.S. Wealth Management Alternatives, Franklin Templeton
- 9:25 – 9:45am **Identifying AI Opportunities in Healthcare**
- **Tim McCarty**, Research Analyst, Janus Henderson Investors
 - Moderator: **Kathleen Entwistle**, Morgan Stanley Private Wealth Management
 - Intro: **Taylor Herron**, Associate Director, Client Coverage Group, Janus Henderson Investors
- 9:45 – 10:05am **Succession Planning**
- **Lisa Kueng**, Managing Director of Business Development, Invesco Global Consulting
- 10:05 – 10:25am **Opportunities in Space – The New Frontier**
- Moderator: **Tim Maul**, Head of Investor Relations, Balerion Space Ventures
- 10:25 – 10:40am **SNACK BREAK**
- 10:40 – 11:00am **Top Advisors – Top Ideas**
- **Wendy Brewer**, Wells Fargo Advisors
 - Moderator: **Kirsten Pickens**, Co-Head of U.S. Distribution, FS Investments
- 11:00 – 11:20am **New Ideas Around Client Engagement**
- **Kimberley Hatchett**, Morgan Stanley Private Wealth Management
 - Moderator: **Rachel Razzano**, Vice President, Account Manager, PIMCO
- 11:20 – 11:25am **SHOOK One's: My Best Idea**
- 11:25 – 11:30am **Keep in Touch, Ladies!**
- **Liz Shook**, COO & Co-Founder, SHOOK Research

FLAGLER HALL
GRAND BALLROOM