

Forbes | SHOOK  
**ALTERNATIVES  
 SUMMIT**  
 JUNE 4, 2026 | NEW YORK, NY

Thursday, June 4, 2026

CE CREDITS AVAILABLE: 3.5 CFP | 4 IMCA

| TIME              | SESSION & SPEAKER  | LOCATION          |
|-------------------|--|-------------------|
| 11:30am – 11:35am | <b>Welcome Remarks</b> <ul style="list-style-type: none"> <li><b>Molly Bennard</b>, President, SHOOK Research</li> </ul>   | FRENCH FORUM      |
| 11:35am – 11:45am | <b>Advisor Insight: How We Are Allocating</b> <ul style="list-style-type: none"> <li><b>Todd Silaika</b>, Merrill Wealth Management</li> <li>Moderator: <b>Prachi Makkar</b>, Vice President, TPG</li> </ul>   |                   |
| 11:45am – 12:00pm | <b>Real Estate &amp; The Opportunity Ahead</b> <ul style="list-style-type: none"> <li><b>A.J. Agarwal</b>, Co-President &amp; Director of BREIT</li> <li>Moderator: <b>Matt Lombardi</b>, Morgan Stanley Wealth Management</li> <li>Intro: <b>Eddie Bernson</b>, Principal, Private Wealth, Blackstone</li> </ul>  |                   |
| 12:00pm – 12:25pm | <b>Myth, Rumors, and Reality of Private Credit</b> <ul style="list-style-type: none"> <li><b>Bill Bohnsack</b>, President &amp; Senior Partner, OHA</li> <li><b>Zia Uddin</b>, President, Monroe Capital</li> <li>Moderator: <b>Yash Dalal</b>, Morgan Stanley Wealth Management</li> </ul>  |                   |
| 12:25pm – 12:30pm | <b>Advisor Insight: How to Go from Reactive to Proactive</b> <ul style="list-style-type: none"> <li><b>Daniel Sherman</b>, Morgan Stanley Wealth Management</li> <li>Intro: <b>Chris Norris</b>, Senior Alternatives Investment Specialist, T. Rowe Price</li> </ul>   |                   |
| 12:30pm – 12:45pm | <b>Evolution of Public &amp; Private Credit: What Now and What's Next?</b> <ul style="list-style-type: none"> <li><b>Lotfi Karoui</b>, Multi-Asset Credit Strategist, Co-Head of Client Solutions and Analytics, PIMCO</li> <li>Moderator: <b>Charles Balducci</b>, Merrill Wealth Management</li> <li>Intro: <b>Sarah Sherr</b>, Account Manager, Private Client Group, PIMCO</li> </ul>  |                   |
| 12:45pm – 1:30pm  | <b>LUNCH / NETWORKING BREAK</b>  | 5TH FLOOR GALLERY |
| 1:30pm – 1:45pm   | <b>Conviction Capital: Real Estate Opportunities in the New Cycle</b> <ul style="list-style-type: none"> <li><b>Brandon Short</b>, Executive Director, Real Estate, PGIM</li> <li>Moderator: <b>Kevin Pearly</b>, SkyPath Private Wealth</li> <li>Intro: <b>Christopher Kerwin</b>, Vice President, Regional Sales Coordinator, PGIM</li> </ul>  |                   |
| 1:45pm – 2:10pm   | <b>Private Equity in Transition: Growth, Secondaries, and Portfolio Construction</b> <ul style="list-style-type: none"> <li><b>Taylor Robinson</b>, Partner, Lexington Partners - A Franklin Templeton Company</li> <li><b>Tamir Yewdaev</b>, Principal, TPG GP Solutions</li> <li>Moderator: <b>Shawn Gold</b>, Merrill Wealth Management</li> </ul>  |                   |
| 2:10pm – 2:15pm   | <b>Advisor Insight: Meeting Clients Where They Are</b> <ul style="list-style-type: none"> <li><b>Michelle McKinnon</b>, Klingman &amp; Associates</li> <li>Intro: <b>Nick Baliya</b>, Vice President, Monroe Capital</li> </ul>  |                   |
| 2:15pm – 2:35pm   | <b>Powering the Future – Infrastructure in the Age of AI and Energy</b> <ul style="list-style-type: none"> <li><b>Peter Aliprantis</b>, Partner, Head of Americas Wealth Solutions, EQT Partners</li> <li>Moderator: <b>Daryl Dewbrey</b>, Managing Director, Head of U.S. Distribution, Unified Global Alternatives, UBS Asset Management</li> <li>Intro: <b>Amir Haghsheenas</b>, Director, Head of Internal Desk, EQT Partners</li> </ul> |                   |
| 2:35pm – 2:55pm   | <b>Access in Action: Building More Resilient Client Portfolios</b> <ul style="list-style-type: none"> <li><b>Chad Tredway</b>, Managing Director, Global Head of Real Estate, J.P. Morgan Asset Management</li> <li>Moderator: <b>David Berdon</b>, Morgan Stanley Private Wealth Management</li> <li>Intro: <b>Stephanie Davis</b>, Managing Director, Head of Private Wealth Alternatives, J.P. Morgan Asset Management</li> </ul>         |                   |
| 2:55pm – 3:15pm   | <b>The Future of Private Markets Investing</b> <ul style="list-style-type: none"> <li><b>Sarah Fox</b>, Portfolio Manager, Multi Alternatives, Invesco Solutions</li> <li>Moderator: <b>Mike Porcelli</b>, Market Leader, Invesco</li> <li>Intro: <b>Jonathan Ross</b>, VP, Market Leader &amp; Senior Advisor Consultant, Invesco</li> </ul>  |                   |

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- 3:15pm – 3:30pm **Ideas for Growing Your Practice**
- [Radhika Mehta](#), J.P. Morgan Wealth Management
  - [Ronan O'Byrne](#), Crescent Pine
  - Moderator: [Allyson Jarecky Freitag](#), Market Leader & Senior Advisor Consultant, Invesco
- 3:30pm – 3:50pm **Escape Velocity: The Investment Case for the SpaceX IPO**
- [Emerson Garnett](#), Principal, Balerion Space Ventures
  - Moderator: [Doug McAdams](#), Technical Advisor, Balerion Space Ventures
- 3:50pm – 4:10pm **The Great Recalibration: Private Markets' Defining Moment**
- [Brian D'Arcy](#), Partner, Sixth Street
  - Moderator: [Steven D'Amico](#), Morgan Stanley Wealth Management
- 4:10pm – 4:15pm **The Last Word**
- [Frank Berland](#), Managing Partner, SHOOK Research
- 4:15pm – 5:15pm **Cocktails**

5TH FLOOR GALLERY

**SHOOK® Connect**

Looking to connect with the SHOOK® Research analyst who interviewed you? Please visit our Directory Booth or email [contact@shookresearch.com](mailto:contact@shookresearch.com)