Forbes | SHOOK

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Hyatt Regency | April 16, 2026

CE CREDITS AVAILABLE

TIME	SESSION & SPEAKER	LOCATION
12:00 – 12:15pm	**Raising Your Team's Percentile** • R.J. Shook, Chairman & Co-Founder, SHOOK Research & Senior Forbes Contributor	GRAND BALLROOM
12:15 – 12:20pm	**SHOOK Ones: Cold Calling is Not Dead** • Connor Strachan, Morgan Stanley Wealth Management • *Intro: Jacob Shook, Associate VP | Rankings, SHOOK Research*	
12:20 – 12:40pm	**Identifying Bespoke Opportunities and Developing Unique Partnerships in Private Markets** • Michael Woolhouse, Co-Managing Partner, TPG GP Solutions • Moderator: Ari Weber, Merrill Wealth Management • *Intro: Scott Martinho, Managing Director, Client and Capital Formation Group, TPG*	
12:40 – 1:00pm	**The Rise of Active ETFs** • Craig Ebeling, Vice President, Head of ETF Strategists, Fidelity Investments Moderator: Lawrence Glazer, Mayflower Advisors • *Intro: Christopher Buteau, Regional Director, Fidelity Investments*	
1:00 – 1:20pm	**Private Real Estate Equity - Driving Income & Growth** • James Brunger, Senior Director, Private Markets Specialist, Invesco • Moderator: Jake Dunn, Morgan Stanley Private Wealth Management • *Intro: Jeff Murphy, Market Leader, Invesco*	
1:20 – 1:25pm	**SHOOK Ones: Attracting Sophisticated Clients Through Portfolio Innovation** • Paul Murray, Merrill Wealth Management • *Intro: Lindsey Winderman, Vice President | Director of Operations, SHOOK Research*	
1:25 – 1:45pm	**Companies NOT Countries - Why International** • Ryan Quinn, Client Portfolio Manager, WCM Investment Management	
1:45 – 2:00pm	**NETWORKING BREAK**	ADRIENNE SALON
2:00 – 2:05pm	**Shook Ones: Growth Through Partnerships** • Kevin Nichols, Morgan Stanley Wealth Management • *Intro: Kaili Moran, Event Coordinator, SHOOK Research*	
2:05 – 2:25pm	**Evolution of Private Credit: What Now and What's Next?** • Brett Condron, Managing Director, Head of Growth Markets, U.S. Global Wealth Management, PIMCO • Moderator: Victor Livingstone, Morgan Stanley Private Wealth Management • *Intro: Mary Kralis Hoppe, Senior Vice President, Private Wealth Director, PIMCO*	
2:25 – 2:45pm	**The Broadening Market: Risk, Breadth & Reality** • Michael Arone, Chief Investment Strategist, State Street Investment Management • Moderator: Peter Princi, Graystone Consulting from Morgan Stanley • *Intro: David Fredrick, Regional Consultant, Massachusetts, State Street Investment Management*	
2:45 – 3:05pm	**Reimagining Financial Research Through a Multi-Dimensional Lens** • Rafe Lewis, Head of Specialist Investment Research, BNY Investments Newton • *Intro: Chris Grant, Regional Investment Consultant, BNY Investments*	
3:05 – 3:25pm	**Building Your Team to Endure** • Raj Sharma, Merrill Private Wealth Management • Marc Marotta, Merrill Private Wealth Management • Moderator: James Libutti, Vice President, Northeast Divisional Manager, Americas Wealth, State Street Investment Management	
3:25 – 3:45pm	**Escape Velocity: The Investment Case for the SpaceX IPO** • Emerson Garnett, Principal, Balerion Space Ventures • Moderator: Henry Wheelwright, Stablepoint Partners	
3:45 – 4:05pm	**Effective Client Engagement** • Peter Disch, Great Point Wealth Advisors • Ramzi Nuwayhid, Merrill Private Wealth Management • Moderator: Jeff Murphy, Market Leader, Invesco	
4:05 – 4:10pm	**The Last Word** Frank Berland, Managing Partner, SHOOK Research	
4:10 – 5:10pm	**Cocktails**	ADRIENNE SALON

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