Forbes | SHOOK
ONTHEROAD

New York Hilton Midtown | March 25, 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	SUTTON COMPLEX
12:15 – 12:20pm	**SHOOK Ones: Enhancing Team Structure with a COO** • Todd Forman, Morgan Stanley Private Wealth Management • *Intro: Jacob Shook, Associate VP | Rankings, SHOOK Research*	
12:20 – 12:40pm	**The Broadening Market: Risk, Breadth & Reality** • Michael Arone, Chief Investment Strategist, State Street Investment Management • Moderator: Benjamin Segal, UBS Wealth Management • *Intro: John Faron, Senior Regional Consultant, State Street Investment Management*	
12:40 – 1:00pm	**The Clear Case for Munis in a Clouded Credit Market** • David Dowden, Managing Director & Portfolio Manager, MacKay Municipal Managers, New York Life Investment Management • Moderator: Andrew Billinghurst, Merrill Wealth Management • *Intro: Jason Coburn, Advisor Consultant, New York Life Investment Management*	
1:00 – 1:20pm	**Investing in the Innovation Economy** • Abhi Arun, Managing Partner, Alkeon Capital • *Intro: Yvonne Yeung Smith, Director, Business Development, Alkeon Capital*	
1:20 – 1:25pm	**SHOOK Ones: Intention and Purpose for Team Development** • Heather Goodbody, Merrill Private Wealth Management • *Intro: Mike Hart, Regional Vice President, Relationship Manager, ProShares*	
1:25 – 1:45pm	**Real Estate Enters the Next Phase of the Cycle** • Zaneta Koplewicz, Co-President and Head of Shareholder Relations of BREIT, Blackstone • Moderator: Evan Steinberg, Morgan Stanley Private Wealth Management • *Intro: Jeanette Pieper, Managing Director, Blackstone Private Wealth*	
1:45 – 2:00pm	NETWORKING BREAK	
2:00 – 2:05pm	**SHOOK Ones: Cultivating Multi-Generational Relationships** • Peter Carolan, Stelvio Private Wealth | Wells Fargo Advisors Financial Network • *Intro: Lindsey Winderman, Vice President | Director of Operations, SHOOK Research*	
2:05 – 2:25pm	**Evolution of Private Credit: What Now and What's Next?** • Lotfi Karoui, Multi-Asset Credit Strategist, Co-Head of Client Solutions and Analytics, PIMCO • Moderator: John Byren, Merrill Wealth Management • *Intro: Dan Hally, Private Wealth Director, PIMCO*	
2:25 – 2:45pm	**Identifying Bespoke Opportunities and Developing Unique Partnerships in Private Markets** • Michael Woolhouse, Co-Managing Partner, TPG GP Solutions • Moderator: Darren De Angelis, Principal, Head of Mid-Atlantic PWM Distribution, TPG • *Intro: Prachi Makkar, Vice President, TPG*	
2:45 – 2:50pm	**SHOOK Ones: Team Structure-Deepening Relationships with Clients** • Lee Nesser, Merrill Wealth Management • *Intro: Jordan Merrill, Associate VP | Senior Research Manager, SHOOK Research*	
2:50 – 3:10pm	**Private Real Estate Equity - Driving Income & Growth** • Max Swango, Managing Director & Global Head of Client Portfolio Management, Invesco Real Estate • Moderator: Jonathan Ross, VP, Market Leader & Senior Advisor Consultant, Invesco	
3:10 – 3:30pm	**Ahead of the Curve… Opportunities in Fixed Income** • Paul McGinn, Senior Vice President, Client Portfolio Manager, Fixed Income Strategy, First Trust	
3:30 – 3:50pm	**Ideas for Growing Your Practice** • Greg Mulligan, UBS Private Wealth Management • Kevin Pearly, SkyPath Private Wealth • Moderator: Jeanette Pieper, Managing Director, Blackstone Private Wealth	
3:50 – 4:00pm	**The Last Word** • Frank Berland, Managing Partner, SHOOK Research	
4:00 – 5:00pm	**Cocktails**	BEEKMAN