

Forbes | SHOOK TOP TEAMS SUMMIT

FEBRUARY 9-11, 2026 | MIAMI BEACH, FL

#ForbesSHOOKTopTeams

Monday, February 9, 2026

TIME	SESSION & SPEAKER	LOCATION
3:30 – 5:00pm	REGISTRATION	OCEAN LAWN
4:00 – 6:00pm	WELCOME RECEPTION	OCEAN LAWN
6:30pm	DINE-AROUNDS WITH PARTNERS	

Tuesday, February 10, 2026

CE CREDITS AVAILABLE

TIME	SESSION & SPEAKER	LOCATION
7:00 – 8:00am	BREAKFAST	LUSTER GALLERIE
7:00am – 4:00pm	REGISTRATION	LUSTER GALLERIE
8:00 – 8:05am	Welcome, America's Best Teams <ul style="list-style-type: none"> • Liz Shook, Co-Founder & COO, SHOOK Research 	SPARKLE BALLROOM
8:05 – 8:15am	The Science Behind Team Growth...and Failure <ul style="list-style-type: none"> • R.J. Shook, Co-Founder & CEO, SHOOK Research, Senior Forbes Contributor 	
8:15 – 8:30am	SHOOK Ones: Intention and Purpose <ul style="list-style-type: none"> • Jeff Bryan, Merrill Wealth Management • Moderator: Steve Samuels, Managing Director, Communications Executive, Merrill Wealth Management and Private Bank • Intro: Jacob Shook, Associate VP Rankings, SHOOK Research 	
8:30 – 8:50am	Technology Outlook 2026: Run It Back, With Clear Eyes <ul style="list-style-type: none"> • Denny Fish, Portfolio Manager and Research Analyst, Janus Henderson Investors • Moderator: Adam Whitesell, Ameriprise Financial Services • Intro: Jon Cowles, Executive Director, Advisor Solutions Group, Janus Henderson Investors 	
8:50 – 9:05am	Diversifying Equity Risk with Private Equity Secondaries <ul style="list-style-type: none"> • Nate Walton, Partner, Head of Ares Private Equity Secondaries • Moderator: Casey Galligan, Partner, Co-Head of U.S. Wealth Management Solutions, Ares 	
9:05 – 9:10am	SHOOK Ones: Proactive Growth Strategies <ul style="list-style-type: none"> • Kent Pearce, Merrill Private Wealth Management • Intro: Lindsey Nacht, Vice President Director of Operations, SHOOK Research 	
9:10 – 9:25am	This Isn't Your Typical Real Estate Cycle <ul style="list-style-type: none"> • Tim Sloan, Vice Chairman & Global Head of Real Estate, Fortress Investment Group • Moderator: Kimberley Hatchett, Morgan Stanley Private Wealth Management • Intro: Rich Lesser, Managing Director, Fortress Investment Group 	
9:25 – 9:40am	Navigating Credit Markets <ul style="list-style-type: none"> • Purnima Puri, Governing Partner and Head of Liquid Credit, HPS Investment Partners • Moderator: Raj Sharma, Merrill Private Wealth Management • Intro: John Christmas, Co-Head of Business Development & Investor Relations, HPS Investment Partners 	
9:40 – 9:55am	SNACK BREAK	LUSTER GALLERIE
9:55 – 10:00am	SHOOK Ones: How to Articulate Our Value Proposition <ul style="list-style-type: none"> • Patrick Schaffer, UBS Private Wealth Management • Intro: Jordan Merrill, Associate VP Senior Research Manager, SHOOK Research 	
10:00 – 10:20am	Private Equity: Deploying Capital Today <ul style="list-style-type: none"> • Viral Patel, CEO, BXPE • Moderator: Joe Lohrer, Head of North America Sales, Blackstone Private Wealth • Intro: Ryan McCracken, Managing Director, Blackstone Private Wealth 	

Forbes | SHOOK TOP TEAMS SUMMIT

FEBRUARY 9-11, 2026 | MIAMI BEACH, FL

#ForbesSHOOKTopTeams

10:20 – 10:40am	<p>Market Outlook: Uncomfortably Bullish</p> <ul style="list-style-type: none"> • Michael Arone, Chief Investment Strategist, State Street Investment Management • Moderator: Eric Applewhite, Morgan Stanley Wealth Management • Intro: Pat Renehan, Vice President, Regional Consultant, State Street Investment Management 	
10:40 – 11:00am	<p>5 Keys to High-Performing Teams</p> <ul style="list-style-type: none"> • Conner McGee, Morgan Stanley Wealth Management • Palmer Murray, UBS Wealth Management • Moderator: Julie Genjac, VP, Managing Director, Applied Insights, Hartford Funds • Intro: Kevin Eberly, Regional Vice President, Advisor Consultant, Hartford Funds 	
11:00 – 11:15am	<p>Powering AI: The Backbone of the Digital Future</p> <ul style="list-style-type: none"> • Sikander Rashid, Global Head of AI Infrastructure, Brookfield • Moderator: Jimmy Klein, Morgan Stanley Private Wealth Management • Intro: Ryan Kulik, Head of Head of Strategic Relationships, Brookfield Private Wealth 	
11:15 – 11:20am	<p>SHOOK Ones: Team Culture & Motivation</p> <ul style="list-style-type: none"> • Tom Wilson, William Blair • Intro: Callie Askins, Senior. Associate VP Senior Project Leader, SHOOK Research 	
11:20 – 11:35am	<p>Private Credit at a Crossroads</p> <ul style="list-style-type: none"> • Greg Hall, Managing Director, Head of U.S. Global Wealth Management, PIMCO • Moderator: Charles Balducci, Merrill Wealth Management • Intro: Dan Hally, Private Wealth Director, NYC Metro, PIMCO 	
11:35 – 11:50am	REFRESHMENT BREAK	LUSTER GALLERIE
11:50 – 12:30pm	BREAKOUTS	
	<p>Breakout #1: Navigating the Crossroads: Private Credit Investing from the Ground Up</p> <ul style="list-style-type: none"> • Bryan Tsu, Managing Director and Portfolio Manager, PIMCO • Greg Conlon, CEO, High Ridge Aviation • Moderator: Marc Karetsky, Morgan Stanley Private Wealth Management 	OCEAN PROMENADE E
	<p>Breakout #2: How to Source and Develop Top Talent for Your Team</p> <ul style="list-style-type: none"> • Andrew Schultz, Morgan Stanley Private Wealth Management • Dryden Pence, Pence Wealth Management, LPL Financial • Moderator: Caroline Gundeck, Managing Director, Head of Client and Field Engagement, Morgan Stanley Wealth Management 	SPLASH 9-10
	<p>Breakout #3: Ideas to Acquire and Retain High Net Worth Clients</p> <ul style="list-style-type: none"> • Perry Buckman, Pathlight Advisors, Wells Fargo Financial Network • Steve Rabin, Ameriprise Financial Services • Moderator: Jim Cotchett, Head of Strategic Client Engagement, U.S. Wealth Solutions, First Eagle Investments 	SPLASH 11-12
12:30 – 12:55pm	TRANSITION TO GENERAL SESSION / NETWORKING BREAK	
12:55 – 1:50pm	LUNCH	SPARKLE BALLROOM
12:55 – 1:00pm	Forbes SHOOK Leveraging Your Forbes Recognition	
1:00 – 1:20pm	<p>Ownership, Leadership & Performance</p> <ul style="list-style-type: none"> • Pete Stavros, Partner and Co-Head of Global Private Equity, KKR • Intro: Brian Shockley, Director, Mountain West Relationship Manager, KKR 	
1:20 – 1:35pm	<p>Insight from the Fastest Growing Team</p> <ul style="list-style-type: none"> • Edmund Agresta, Morgan Stanley Wealth Management • Moderator: Peter Prinstein, Head of Private Client Group Sales, PIMCO 	
1:35 – 1:50pm	NETWORKING BREAK	
1:50 – 2:05pm	TRANSITION TO BREAKOUTS	
2:05 – 2:45pm	<p>Breakout #1: Nuances of Bringing on Family Members to a Team</p> <ul style="list-style-type: none"> • Nestor Vicknair, Merrill Wealth Management • Kyle Kelley, Merrill Wealth Management • Morgan Vicknair, Merrill Wealth Management • Cole Vicknair, Merrill Wealth Management 	OCEAN PROMENADE E

Forbes | SHOOK TOP TEAMS SUMMIT

FEBRUARY 9-11, 2026 | MIAMI BEACH, FL

#ForbesSHOOKTopTeams

	<p>Breakout #2: Incorporating a COO Onto Your Team</p> <ul style="list-style-type: none"> • Paul Santavicca, Morgan Stanley Private Wealth Management • Kathleen Wilson, Pathlight Advisors, Wells Fargo Financial Network • Moderator: Jonathan Ross, VP, Market Leader & Senior Advisor Consultant, Invesco 	SPLASH 9-10
	<p>Breakout #3: Compensating and Motivating Team Members</p> <ul style="list-style-type: none"> • Michael Valdes, Merrill Private Wealth Management • Benjamin Leshem, HLM Capital Wells Fargo Financial Network • Moderator: Alberto Gonzalez, Divisional President, Wells Fargo Advisors 	SPLASH 11-12
2:45 – 3:00pm	REFRESHMENT BREAK / TRANSITION TO GENERAL SESSION	
3:00 – 3:15pm	<p>Ideas for Growing Together</p> <ul style="list-style-type: none"> • Tony Carpentieri, Merrill Private Wealth Management • Liza Carey, Merrill Private Wealth Management • Moderator: John Edenbach, Managing Director, Business Development, GoldenTree Asset Management 	
3:15 – 3:30pm	<p>Beyond the Blueprint: Crafting Tailored Private Equity Opportunities for a New Era</p> <ul style="list-style-type: none"> • Steve Willmann, Co-Portfolio Manager of TPOP and Treasurer of TPG • Moderator: Richard Zinman, Morgan Stanley Private Wealth Management • Intro: Colin Morris, Principal, Head of SE PWM Distribution, TPG 	
3:30 – 3:50pm	<p>Success in Succession Planning</p> <ul style="list-style-type: none"> • Dave Niehaus, Merrill Private Wealth Management • Scott Tiras, Ameriprise Financial Services • Moderator: Robert Bruno, Vice Chairman of U.S. Wealth Solutions, First Eagle Investments • Intro: Jim Cotchett, Head of Strategic Client Engagement, U.S. Wealth Solutions, First Eagle Investments 	
3:50 – 4:05pm	<p>The Digital Future: How Stablecoins are Blurring the Lines Between Traditional and Digital Assets</p> <ul style="list-style-type: none"> • John Tobin, Chief Investment Officer, BNY Investments Dreyfus • Moderator: Cynthia Chamberlayne, Senior Investment Strategist - Advisor Enablement, BNY Investments • Intro: Chad Nordhagen, Senior Investment Consultant, BNY Investments 	
4:05 – 4:20pm	SNACK BREAK	LUSTER GALLERIE
4:20 – 4:25pm	<p>SHOOK Ones: Team Compensation</p> <ul style="list-style-type: none"> • Peter Rohr, Merrill Private Wealth Management • Intro: Amman Chuhan, Analyst, SHOOK Research 	
4:25 – 4:40pm	<p>What's the "Spare Tire" in Your Portfolio?</p> <ul style="list-style-type: none"> • Richard Bernstein, CEO & CIO, Richard Bernstein Advisors • Intro: Dan Shannon, Executive Director, Advisor Solutions Group, Janus Henderson Investors 	
4:40 – 4:55pm	<p>Rethinking Real Estate's Role in Income Portfolios</p> <ul style="list-style-type: none"> • Kate Bassett, Portfolio Manager, Invesco • Moderator: Jaynie Siegel, Morgan Stanley Wealth Management • Intro: Derek Witte, VP, Market Leader, Invesco 	
4:55 – 5:25pm	<p>SHOOK* Teams Best Idea Competition</p> <ul style="list-style-type: none"> • Judge: Amy Schoenherr, Director of Financial Advisor Recognition, Wells Fargo Advisors • Judge: Pat Murchison, SVP, Divisional Director, LPL Financial • Judge: Ken Correa, Managing Director, Head of Business & Client Development, Merrill Wealth Management • Moderator: Liz Shook, Co-Founder & COO, SHOOK Research • Moderator: Jacob Shook, Associate VP Rankings, SHOOK Research • Moderator: Frank Berland, Managing Partner, SHOOK Research 	
5:25 – 5:30pm	<p>Cocktails Countdown!</p> <ul style="list-style-type: none"> • Frank Berland, Managing Partner, SHOOK Research 	
5:30 – 6:30pm	Cocktail Reception	LUSTER GALLERIE

Forbes | SHOOK TOP TEAMS SUMMIT

FEBRUARY 9-11, 2026 | MIAMI BEACH, FL

#ForbesSHOOKTopTeams

Wednesday, February 11, 2026

8:00 – 9:00am	BREAKFAST	LUSTER GALLERIE
9:00 – 9:05am	Coffee with Lizzy <ul style="list-style-type: none"> • Liz Shook, Co-Founder & COO, SHOOK Research 	SPARKLE BALLROOM
9:05 – 9:10am	SHOOK Ones: Scaling Your Service Model for Growth: Building the Family Office Flywheel <ul style="list-style-type: none"> • Trevor Byrne, Morgan Stanley Wealth Management • <i>Intro: Luke Bartow, Associate VP Senior Event Programmer, SHOOK Research</i> 	
9:10 – 9:30am	The Opportunity for Inorganic Growth with Retiring Advisors <ul style="list-style-type: none"> • Lars Olson, Alluvial Private Wealth • Katie Hancock, Morgan Stanley Wealth Management • Moderator: Vince Fertitta, President, Sanctuary Wealth • <i>Intro: Blake Pastore, Senior Associate VP Advisor Services Manager, SHOOK Research</i> 	
9:30 – 9:50am	Five Considerations <ul style="list-style-type: none"> • Gibson Smith, Founder, Smith Capital Investors 	
9:50 – 10:10am	A Proven Path to Growth: Four Pillars Behind Advisor Success <ul style="list-style-type: none"> • Ken Van Leeuwen, Van Leeuwen & Company, LPL Financial • Drew Freides, UBS Private Wealth Management • Moderator: Pat Murchison, SVP, Divisional Director, LPL Financial • <i>Intro: Erick Lopez, Associate VP Research Manager, SHOOK Research</i> 	
10:10 – 10:25am	SNACK BREAK	LUSTER GALLERIE
10:25 – 10:30am	SHOOK Ones: Ideas for Leadership and Development of Your Team <ul style="list-style-type: none"> • Tyler Johns, Edward Jones • <i>Intro: Kaili Moran, Event Coordinator, SHOOK Research</i> 	
10:30 – 10:50am	The Great Wealth Transfer: Supporting Families and Engaging with the Next Gen <ul style="list-style-type: none"> • Jessica Douieb, Head of Wealth Partners and Family Wealth Services, J.P. Morgan Wealth Management • Moderator: Christian Cram, J.P. Morgan Wealth Management 	
10:50 – 11:10am	Deepening Client Engagement <ul style="list-style-type: none"> • Malia Morales, Merrill Private Wealth Management • Adam Carlin, Morgan Stanley Private Wealth Management • Moderator: Cynthia Chamberlayne, Senior Investment Strategist - Advisor Enablement, BNY Investments 	
11:10 – 11:25am	Advisor to Leader: Aligning Culture and Growth <ul style="list-style-type: none"> • Mark Thorndyke, Merrill Wealth Management • George Papadoyannis, Ameriprise Financial Services • Moderator: Prachi Makkar, Vice President, TPG 	
11:25 – 11:30am	The Last Word <ul style="list-style-type: none"> • Liz Shook, Co-Founder & COO, SHOOK Research 	

SHOOK® Connect

Looking to connect with the SHOOK® Research analyst who interviewed you? Please visit our Directory Booth in the Exhibitor Area, or email contact@shookresearch.com