

# Forbes | SHOOK TOP WOMEN ADVISOR SUMMIT

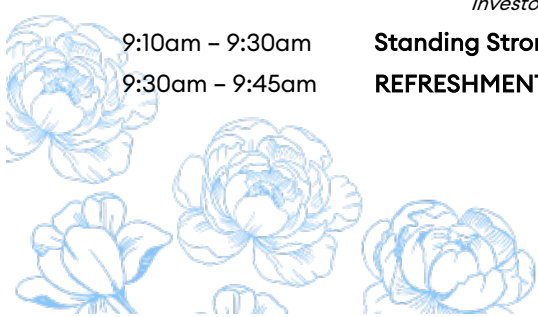


## MONDAY, MAY 18, 2026

TIME	SESSION & SPEAKER	LOCATION
3:30pm – 6:00pm	REGISTRATION	REGISTRATION HALL
5:00pm – 6:00pm	WELCOME RECEPTION	OCEAN BALLROOM / FLAGLER HALL
6:15pm	GALA DINNER	GRAND BALLROOM
6:45pm – 6:55pm	<b>Welcome to Our Very Special Event</b> <ul style="list-style-type: none"> <li>• <b>Liz Shook</b>, Co-Founder &amp; COO, SHOOK Research</li> </ul>	
6:55pm – 7:10pm	<b>We're Here on Purpose</b> <ul style="list-style-type: none"> <li>• <b>R.J. Shook</b>, Chairman &amp; Co-Founder, SHOOK Research &amp; Senior Forbes Contributor</li> </ul>	
7:10pm – 7:55pm	<b>Grit, Integrity &amp; Reinvention</b> <ul style="list-style-type: none"> <li>• <b>Molly Bloom</b>, Top Booked Inspirational Speaker, Subject of the Oscar-Nominated Film, "Molly's Game", Bestselling Author, U.S. Ski Team Alum, and Host of Award-Winning Podcast, "Torched"</li> <li>• Moderator: <b>Blake Eggemeyer</b>, Chief Marketing Officer, SHOOK Research</li> </ul>	

## TUESDAY, MAY 19, 2026

7:00am – 4:00pm	REGISTRATION	REGISTRATION HALL
7:00am – 8:00am	BREAKFAST	FLAGLER HALL
8:00am – 8:10am	<b>The Next Two Days: Priorities, Perspectives &amp; Possibilities</b> <ul style="list-style-type: none"> <li>• <b>Molly Bennard</b>, President, SHOOK Research</li> </ul>	GRAND BALLROOM
8:10am – 8:25am	<b>SHOOK Ones: Constructing and Executing a Multigenerational Team</b> <ul style="list-style-type: none"> <li>• <b>Mary Mullin</b>, Merrill Wealth Management</li> <li>• <b>Kyle Olson</b>, Merrill Wealth Management</li> <li>• Moderator: <b>Ken Correa</b>, Managing Director, Head of Business &amp; Client Development, Merrill Wealth Management</li> </ul>	
8:25am – 8:45am	<b>Filter and Focus: Keeping Your Head in Today's Headline-Driven Markets</b> <ul style="list-style-type: none"> <li>• <b>Emily Roland</b>, Co-Chief Investment Strategist, Multi-Asset Solutions, Manulife John Hancock Investments</li> <li>• Moderator: <b>Sarah Ponczek</b>, UBS Private Wealth Management</li> <li>• <i>Intro: <b>Megan Hopps</b>, Divisional Sales Manager, Manulife John Hancock Investments</i></li> </ul>	
8:45am – 8:50am	<b>SHOOK Ones: Team Culture – Improving Through Feedback</b> <ul style="list-style-type: none"> <li>• <b>Catherine Evans</b>, J.P. Morgan Wealth Management</li> </ul>	
8:50am – 9:10am	<b>The Future of the GLP-1s: What's Next for the Booming Weight-Loss Drugs?</b> <ul style="list-style-type: none"> <li>• <b>Luyi Guo</b>, Research Analyst, Janus Henderson Investors</li> <li>• Moderator: <b>Katie Hancock</b>, Morgan Stanley Wealth Management</li> <li>• <i>Intro: <b>Olivia Hails</b>, Executive Director, Advisor Solutions Group, Janus Henderson Investors</i></li> </ul>	
9:10am – 9:30am	<b>Standing Strong with Children's Cancer Research Fund</b>	
9:30am – 9:45am	REFRESHMENT BREAK	FLAGLER HALL



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9:45am – 10:05am	<b>The Business of Breaking Barriers: A Conversation on Capital, Access, and the Future of Women’s Sports</b> <ul style="list-style-type: none"> <li>• <b>Betsy Morgan</b>, Co-Founder, Magnet Companies</li> <li>• Moderator: <b>Kate Schuler</b>, Principal, Sports, Media and Entertainment Product Specialist, Ares Management</li> </ul>	GRAND BALLROOM
10:05am – 10:10am	<b>SHOOK Ones: Architect Your Practice</b> <ul style="list-style-type: none"> <li>• <b>Dianna Smith</b>, Morgan Stanley Wealth Management</li> </ul>	
10:10am – 10:30am	<b>Building Advanced HNW Portfolios: Customization, Tax Efficiency, and Alternatives</b> <ul style="list-style-type: none"> <li>• <b>Nelson Scott</b>, Vice President, High Net Worth Specialist, PGIM</li> <li>• Moderator: <b>Elizabeth Angelone</b>, Merrill Wealth Management</li> <li>• <i>Intro: <b>Lucy Masuret</b>, Vice President, Regional Consultant, PGIM</i></li> </ul>	
10:30am – 10:50am	<b>The Private Markets Case for European Tech</b> <ul style="list-style-type: none"> <li>• <b>Carolina Brochado</b>, Partner, Head of EQT Ventures &amp; Head of Growth US, EQT Partners</li> <li>• <b>Kerry Karangelen</b>, Morgan Stanley Private Wealth Management</li> <li>• <i>Intro: <b>Amy Appicelli</b>, Managing Director, Head of Marketing, Americas, EQT Partners</i></li> </ul>	
10:50am – 11:10am	<b>Small Room Big Deal: Winning Strategies for High Stakes Meetings</b> <ul style="list-style-type: none"> <li>• <b>Jeannie Underwood-Kotner</b>, Director, Head of The Consulting Group, Global Atlantic a Business of KKR</li> </ul>	
11:10am – 11:25am	<b>SNACK BREAK</b>	FLAGLER HALL
11:25am – 12:25pm	<b>ROUNDTABLES – PLAZA I, OCEAN I, OCEAN II, EXCHANGE</b> <i>*PLEASE REFER TO THE BACK OF YOUR BADGE FOR YOUR ROOM ASSIGNMENT*</i>	
12:25pm	<b>LUNCH</b>	GRAND BALLROOM
12:25pm – 12:30pm	<b>Forbes   SHOOK Directory Exclusive Offer</b>	
12:30pm – 12:35pm	<b>Raise Update from Children's Cancer Research Fund</b> <ul style="list-style-type: none"> <li>• <b>Elizabeth Allen</b>, CEO, Children's Cancer Research Fund</li> </ul>	
12:35pm – 12:40pm	<b>SHOOK Ones: Opportunities with Women Owned Businesses</b> <ul style="list-style-type: none"> <li>• <b>Michelle Fuller</b>, Bartholomew &amp; Company, LPL Financial</li> </ul>	
12:40pm – 12:50pm	<b>NETWORKING BREAK</b>	FLAGLER HALL
12:50pm – 1:15pm	<b>Markets in the Age of Disruption</b> <ul style="list-style-type: none"> <li>• <b>Cathie Wood</b>, Founder, CEO and CIO, ARK Invest</li> <li>• Moderator: <b>Kelly Rodigas</b>, Chief of Staff, US Wealth Management, UBS</li> </ul>	GRAND BALLROOM
1:15pm – 1:35pm	<b>Is Work Life Balance Possible?</b> <ul style="list-style-type: none"> <li>• <b>Sheila Klehm</b>, UBS Private Wealth Management</li> <li>• <b>Stacey Crittenden</b>, Merrill Wealth Management</li> <li>• Moderator: <b>Prachi Makkar</b>, Vice President, TPG</li> </ul>	
1:35pm – 1:55pm	<b>Staying Ahead of the Curve - What's Next in Real Estate</b> <ul style="list-style-type: none"> <li>• <b>Seray Incoglu</b>, Portfolio Manager, Commercial Real Estate, PIMCO</li> <li>• Moderator: <b>Jaynie Siegel</b>, Morgan Stanley Wealth Management</li> <li>• <i>Intro: <b>Rachael Razzano</b>, Vice President, Account Manager, PIMCO</i></li> </ul>	
1:55pm – 2:15pm	<b>REFRESHMENT BREAK</b>	FLAGLER HALL



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2:15pm – 2:35pm	<b>The Alpha in the Underserved: Lending in the Lower Middle Market</b> <ul style="list-style-type: none"><li>• <b>Kim Trick</b>, Co-Chief Credit Officer and Partner, TPG Twin Brook</li><li>• Moderator: <b>Kathleen Entwistle</b>, Morgan Stanley Private Wealth Management</li><li>• <i>Intro: Alexandra Heinicka, Vice President, TPG</i></li></ul>	<b>GRAND BALLROOM</b>
2:35pm – 2:55pm	<b>Become the Practice of the Future by Leveraging AI</b> <ul style="list-style-type: none"><li>• <b>Jasmine Sehgal</b>, Merrill Wealth Management</li><li>• <b>Emily Mulka</b>, Morgan Stanley Private Wealth Management</li><li>• <b>Kim Gilleland</b>, Executive Director, Head of Practice Management Consultants, Morgan Stanley</li></ul>	
2:55pm – 3:00pm	<b>SHOOK Ones: Team Mentorship with Purpose</b> <ul style="list-style-type: none"><li>• <b>Jen Garcia</b>, Wells Fargo Advisors</li></ul>	
3:00pm – 3:20pm	<b>Unlock Tax Advantages and Manage Risk with Private Real Estate Credit Solutions</b> <ul style="list-style-type: none"><li>• <b>Kate Bassett</b>, Portfolio Manager, Invesco</li><li>• Moderator: <b>Lara Magnusen</b>, Merrill Private Wealth Management</li><li>• <i>Intro: Caroline Carley, VP, Market Leader, Invesco</i></li></ul>	
3:20pm – 3:35pm	<b>SNACK BREAK</b>	<b>FLAGLER HALL</b>
3:35pm – 3:55pm	<b>Cracking the Code: What HNW Women Really Want from Their Advisor</b> <ul style="list-style-type: none"><li>• <b>Mary Ware</b>, Carnegie Private Wealth, LPL Financial</li><li>• <b>Anna Winderbaum</b>, Morgan Stanley Private Wealth Management</li><li>• Moderator: <b>Tara Popernik</b>, EVP   Wealth Planning, LPL Financial</li></ul>	<b>GRAND BALLROOM</b>
3:55pm – 4:10pm	<b>Party Like It's...1965!!!</b> <ul style="list-style-type: none"><li>• <b>Richard Bernstein</b>, Global Head of Macro &amp; Customized Investing, Janus Henderson Investors</li><li>• <i>Intro: Heather Jack, Executive Director, Advisor Solutions Group, Janus Henderson Investors</i></li></ul>	
4:10pm – 4:25pm	<b>The Art of Leading a Team</b> <ul style="list-style-type: none"><li>• <b>Karen Robbins</b>, UBS Wealth Management</li><li>• <b>Lorayne Fiorillo</b>, Raymond James &amp; Associates</li><li>• Moderator: <b>Allison Bonds Mazza</b>, Head of US Wealth, State Street Investment Management</li></ul>	
4:25pm – 4:45pm	<b>The New Center of Gravity: Women, Wealth, and the Future of Advice</b> <ul style="list-style-type: none"><li>• <b>Lisa Howe</b>, NEST Capital   Wells Fargo Advisors Financial Network</li><li>• <b>Beth Chandler</b>, Cresset</li><li>• Moderator: <b>Heather Pelant</b>, Managing Director, Cresset</li></ul>	
4:45pm – 5:15pm	<b>SHOOK® Best Idea Competition</b> <ul style="list-style-type: none"><li>• <b>Liz Shook</b>, Co-Founder &amp; COO, SHOOK Research</li><li>• <b>Frank Berland</b>, Managing Partner, SHOOK Research</li><li>• <b>Jacob Shook</b>, Associate VP   Rankings, SHOOK Research</li><li>• Judge: <b>Heather Hunt-Ruddy</b>, Senior Managing Director, Central Division President, Wells Fargo Advisors</li><li>• Judge: <b>Steve Samuels</b>, Managing Director, Communications Executive for Merrill Wealth Management, The Private Bank and Global Corporate &amp; Investment Banking</li><li>• Judge: <b>John Rahal</b>, Principal, Private Wealth, Edward Jones</li></ul>	



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5:15pm	<b>Let's Get Cocktails!</b> <ul style="list-style-type: none"> <li>• <a href="#">Frank Berland</a>, Managing Partner, SHOOK Research</li> </ul>	
5:30pm – 6:30pm	<b>Cocktail Reception</b>	<b>COURTYARD LAWN</b>
<b>WEDNESDAY, MAY 20, 2026</b>		
8:00am – 9:00am	<b>BREAKFAST</b>	<b>FLAGLER HALL</b>
9:00am – 9:05am	<b>Good Morning...More Coffee Please!</b> <ul style="list-style-type: none"> <li>• <a href="#">Liz Shook</a>, Co-Founder &amp; COO, SHOOK Research</li> </ul>	<b>GRAND BALLROOM</b>
9:05am – 9:25am	<b>Balancing Sustainable Growth With Personal Service</b> <ul style="list-style-type: none"> <li>• <a href="#">Jessica Valera</a>, Raymond James &amp; Associates</li> <li>• <a href="#">Cheryl Smith</a>, Merrill Private Wealth Management</li> <li>• Moderator: <a href="#">Tash Elwyn</a>, President, Private Client Group, Raymond James</li> </ul>	
9:25am – 9:45am	<b>Adapting Portfolios for Economic Regime Change</b> <ul style="list-style-type: none"> <li>• <a href="#">Lauren Goodwin</a>, Managing Director, Chief Investment Strategist for Global Wealth, KKR</li> <li>• Moderator: <a href="#">Kimberley Hatchett</a>, Morgan Stanley Private Wealth Management</li> <li>• <i>Intro: <a href="#">Corry Hyer</a>, Director, KKR Senior Relationship Manager</i></li> </ul>	
9:45am – 10:05am	<b>Be Fearless: In the Face of Geopolitical Uncertainty and Market Volatility</b> <ul style="list-style-type: none"> <li>• <a href="#">Mary Ann Bartels</a>, Chief Investment Strategist, Sanctuary Wealth</li> </ul>	
10:05am – 10:25am	<b>Success in Succession Planning</b> <ul style="list-style-type: none"> <li>• <a href="#">Susanne Thalman</a>, Edward Jones</li> <li>• <a href="#">Kristin Bloom</a>, UBS Wealth Management</li> <li>• Moderator: <a href="#">Cady Johnson</a>, Head of Field Sales, U.S. Global Wealth Management, PIMCO</li> </ul>	
10:25am – 10:45am	<b>SNACK BREAK</b>	<b>FLAGLER HALL</b>
10:45am – 11:05am	<b>Lead, Delegate, Grow</b> <ul style="list-style-type: none"> <li>• <a href="#">Bonnie Mitten</a>, Morgan Stanley Wealth Management</li> <li>• <a href="#">Katherin Romero</a>, Merrill Wealth Management</li> <li>• Moderator: <a href="#">Caroline Gundeck</a>, Managing Director, Head of Client and Field Engagement, Morgan Stanley Wealth Management</li> </ul>	<b>GRAND BALLROOM</b>
11:05am – 11:10am	<b>SHOOK Ones: My Best Idea</b> <ul style="list-style-type: none"> <li>• <a href="#">Nancy Popovich</a>, Baird</li> </ul>	
11:10am – 11:25am	<b>The Human Side of AI</b> <ul style="list-style-type: none"> <li>• <a href="#">Amy DeTolla</a>, Founder and CEO, Aureus Advantage</li> </ul>	
11:25am – 11:30am	<b>Keep in Touch, Ladies!</b> <ul style="list-style-type: none"> <li>• <a href="#">Liz Shook</a>, Co-Founder &amp; COO, SHOOK Research</li> </ul>	

