

Forbes | SHOOK ALTERNATIVES SUMMIT

Beverly Wilshire | Tuesday, March 10, 2026

CE CREDITS AVAILABLE

TIME	SESSION & SPEAKER	LOCATION
11:00 – 11:05am	Welcome Remarks <ul style="list-style-type: none"> • Frank Berland, Managing Partner, SHOOK Research 	BALLROOM
11:05 – 11:10am	SHOOK Ones: Value of Adding a Chief of Staff to a Teams Practice <ul style="list-style-type: none"> • John Shadden, Morgan Stanley Private Wealth Management • Intro: Jacob Shook, Associate VP Rankings, SHOOK Research 	
11:10 – 11:30am	Rethinking Real Estate's Role in Income Portfolios <ul style="list-style-type: none"> • Charlie Rose, Head of Real Estate Credit, Invesco • Moderator: Mark Vandeburgt, Wells Fargo Advisors 	
11:30 – 11:50am	Investing in the Innovation Economy <ul style="list-style-type: none"> • Abhi Arun, General Partner, Alkeon Capital 	
11:50 – 11:55am	SHOOK Ones: 3 Pillars to a Successful Team <ul style="list-style-type: none"> • Nicholas Schirripa, UBS Wealth Management • Intro: Madison Rizzo, Associate VP Senior Partnership Manager, SHOOK Research 	
11:55am – 12:15pm	Identifying Bespoke Opportunities & Developing Unique Partnerships in Private Markets <ul style="list-style-type: none"> • Michael Woolhouse, Co-Managing Partner, TPG GP Solutions • Moderator: Karin Longhurst, Morgan Stanley Private Wealth Management • Intro: Matt Sekera, Managing Director, TPG 	
12:15 – 12:35pm	Evolution of Private Credit: What Now and What's Next? <ul style="list-style-type: none"> • Jason Mandinach, Head of Alternative Credit and Private Strategies, PIMCO • Moderator: David Hou, Evoke Advisors • Intro: Matt Melhado, Senior Vice President & Account Manager, PIMCO 	
12:35 – 1:20pm	LUNCH / NETWORKING BREAK	
1:20 – 1:25pm	Shook Ones: Deepening Your Engagement Through Estate Planning <ul style="list-style-type: none"> • John Brow, Merrill Wealth Management • Intro: Catalina Rivera, Associate VP Events, SHOOK Research 	
1:25 – 1:45pm	Credit Markets Outlook: Risks, Rates, and Resilience <ul style="list-style-type: none"> • Jeffrey Sherman, Deputy Chief Investment Officer, DoubleLine Capital • Moderator: Alex Shahidi, Evoke Advisors 	
1:45 – 2:05pm	The Infrastructure Behind AI, Data, Power, and Transportation <ul style="list-style-type: none"> • Erwin Thompson, Partner, Infrastructure and CEO of EQIC, EQT Partners • Moderator: Jimmy Klein, Morgan Stanley Private Wealth Management • Intro: Eugene Hsieh, Director, Global Wealth Solutions, EQT Partners 	
2:05 – 2:25pm	Building the Room Before You Build the Revenue <ul style="list-style-type: none"> • Lara Magnusen, Merrill Private Wealth Management • Eliau Ohebshalom, Morgan Stanley Wealth Management • Moderator: Nick Cirbo, VP, Market Leader, Invesco 	
2:25 – 2:45pm	Ideas from LA's Top Private Wealth Team <ul style="list-style-type: none"> • Richard Jones, Merrill Private Wealth Management • Eleni Mavromati, Merrill Private Wealth Management • Moderator: Steven Pogorelec, EVP, Head of Private Wealth, U.S. Global Wealth Management, PIMCO 	
2:45 – 3:05pm	Venture Capital Meets National Security: Investing in Dual-Use Space & Defense <ul style="list-style-type: none"> • Ryan Sullivan, Co-Founder, Space Kinetic • Moderator: Aidan Daoussis, Senior Associate, Balerion Space Ventures 	
3:05 – 3:10pm	The Last Word <ul style="list-style-type: none"> • Jenny DeSeno, Associate VP Senior Project Leader, SHOOK Research 	
3:10 – 4:10pm	Cocktails	WINTERGARDEN

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