

Forbes | SHOOK ON-THE-ROAD

Hyatt Regency Boston

#ForbesSHOOK

Tuesday, December 5, 2023

TIME	SESSION & SPEAKER
12:00 – 12:15pm	Transformative Leadership <ul style="list-style-type: none">• R.J. Shook, Co-Founder & President, SHOOK Research & Senior Forbes Contributor
12:15 – 12:20pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Trevor Byrne, Morgan Stanley Wealth Management• <i>Introduction: Joe Daly, Senior Investment Consultant, Thornburg</i>
12:20 – 12:40pm	Progression of Modern Value: Client Engagement <ul style="list-style-type: none">• Jackie Wilke, Vice President & Advisor Consultant, First Trust
12:40 – 1:00pm	The State of the High Yield Market <ul style="list-style-type: none">• Ryan Larson, Co-Equal Head Portfolio Manager, Strategic Income Management• Moderator: Tom Desiderio, Regional Vice President, Resolute Investment Managers
1:00 – 1:20pm	SPDR 2024 Market Outlook: Testing Resilience <ul style="list-style-type: none">• Mike Arone, Chief Investment Strategist, State Street Global Advisors SPDR• Moderator: Raj Sharma, Merrill Private Wealth Management• <i>Introduction: James Libutti, Regional Consultant, State Street Global Advisors SPDR</i>
1:20 – 1:25pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Gabrielle Clemens, RBC Wealth Management• <i>Introduction: Jenny DeSeno, Associate VP Project Leader, SHOOK Research</i>
1:25 – 1:45pm	Portfolio Construction and Strategy: The Portfolio Pivot <ul style="list-style-type: none">• Lara Castleton, U.S. Head of Portfolio Construction and Strategy, Janus Henderson Investors• <i>Introduction: Brian Arcara, Director, Advisor Solutions Group, Janus Henderson Investors</i>
1:45 – 2:05pm	Networking Break
2:05 – 2:25pm	Opportunities in Private Credit <ul style="list-style-type: none">• Eric Muller, OCREDIT CEO, Oak Hill Advisors• Moderator: Larry Weissman, Cerity Partners
2:25 – 2:30pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Raj Pathak, Morgan Stanley Wealth Management• <i>Introduction: Dylan Ferrante, Marketing Analyst, SHOOK Research</i>

Forbes | SHOOK ON-THE-ROAD

Hyatt Regency Boston

#ForbesSHOOK

Tuesday, December 5, 2023

TIME	SESSION & SPEAKER
2:30 – 2:50pm	Optimizing Alternatives: Balancing Public-Private Allocations <ul style="list-style-type: none">• Carlos Whitaker, Senior Managing Director, Blackstone Credit• Frank Cohen, Senior Managing Director, Blackstone Real Estate• Moderator: John Cronin, Managing Director, Blackstone Private Wealth Solutions• <i>Introduction: John Gaines, Principal, Blackstone Private Wealth Solutions</i>
2:50 – 3:10pm	Thinking Macro, Investing Micro: Real Estate Insights <ul style="list-style-type: none">• Garret Overlock, Managing Director, Acquisitions, Starwood Capital Group• Moderator: Victor Livingstone, Morgan Stanley Private Wealth Solutions• <i>Introduction: Kirk Willett, East Coast Lead, Starwood Capital</i>
3:10 – 3:30pm	Traits of a Successful Team <ul style="list-style-type: none">• Brian Strachan, Morgan Stanley Private Wealth Management• Jim Fair, UBS Wealth Management• Moderator: Eric Ring, Divisional Sales Head, Janus Henderson Investors
3:30 – 3:50pm	Compensating and Motivating Team Members <ul style="list-style-type: none">• Mary Mullin, Merrill Wealth Management• Peter Princi, Graystone Consulting from Morgan Stanley• Moderator: Jeff Murphy, Market Leader, Invesco
3:50 – 4:00pm	The Last Word <ul style="list-style-type: none">• Frank Berland, Managing Partner, SHOOK Research
4:00 – 4:45pm	Cocktail Reception