

Forbes | SHOOK ON-THE-ROAD

JW Marriott Chicago

#ForbesSHOOK

Thursday, November 30, 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">• Eric Hayes, Morgan Stanley Wealth Management• <i>Introduction: Lindsey Nacht, Vice President Director of Operations, SHOOK Research</i>
12:20 – 12:40pm	Transformational Conversations: Blueprints from America’s Top Advisor Teams <ul style="list-style-type: none">• Chris Brady, Regional Vice President, Pacific Life• <i>Introduction: Madison Rizzo, Senior Analyst, SHOOK Research</i>
12:40 – 1:00pm	Optimizing Alternatives: Balancing Public-Private Allocations <ul style="list-style-type: none">• Andrew Park, Principal, Blackstone Credit• Andrew Fenet, Managing Director, Blackstone Real Estate• Moderator: Debbie Michaelson, Principal, Blackstone Private Wealth Solutions• <i>Introduction: John Bogosian, Principal, Blackstone Private Wealth Solutions</i>
1:00 – 1:20pm	Wealth Advisor’s Guide: Improve Your Practice <ul style="list-style-type: none">• Matt Sommer, Head of Specialist Consulting Group, Janus Henderson Investors• <i>Introduction: Jonathan Root, Director, Advisor Solutions Group, Janus Henderson Investors</i>
1:20 – 1:25pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Alex Marks, Citi Personal Wealth Management
1:25 – 1:45pm	Growth Opportunities Beyond the Magnificent 7 <ul style="list-style-type: none">• Richard Bernstein, CEO & CIO, Richard Bernstein Advisors• <i>Introduction: Tim Kuhn, Portfolio Specialist, Richard Bernstein Advisors</i>
1:45 – 2:00pm	Networking Break
2:00 – 2:20pm	International Investing: Navigating New Realities <ul style="list-style-type: none">• Kathrin Forrest, Equity Investment Specialist, Capital Group, Home of American Funds• Moderator: George Wenzel, Senior Sales Development Manager, Capital Group, Home of American Funds
2:20 – 2:40pm	SPDR 2024 Market Outlook: Testing Resilience <ul style="list-style-type: none">• Mike Arone, Chief Investment Strategist, State Street Global Advisors SPDR• Moderator: Andy Timmerwilke, Merrill Wealth Management• <i>Introduction: Tope Awoniyi, Vice President, Regional Consultant, State Street Global Advisors SPDR</i>

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2:40 – 3:00pm	Retain Your Brain <ul style="list-style-type: none">• Bill McManus, Vice President, Hartford Funds• <i>Introduction: Tom Dewbray, Regional Vice President, Hartford Funds</i>
3:00 – 3:20pm	The U.S. Economic and Political Outlook <ul style="list-style-type: none">• Bob Stein, Deputy Chief Economist, First Trust Advisors
3:20 – 3:40pm	Opportunity in Private Real Estate Credit <ul style="list-style-type: none">• Dennis Schuh, CEO, Starwood Credit Real Estate Income Trust• Moderator: Ted Davis, Morgan Stanley Wealth Management• <i>Introduction: Sean Pronger, West Coast Lead, Starwood Capital</i>
3:40 – 3:45pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Kevin Lynch, Morgan Stanley Private Wealth Management• <i>Introduction: Jordan Merrill, Senior Analyst, SHOOK Research</i>
3:45 – 4:05pm	How to Create Team Capacity <ul style="list-style-type: none">• Jacob Pottschmidt, J.P. Morgan Wealth Management• John Cultra, William Blair• Moderator: Peter Lazor, Market Leader, J.P. Morgan Wealth Management
4:05 – 4:10pm	The Last Word <ul style="list-style-type: none">• Frank Berland, Managing Partner, SHOOK Research
4:10 – 5:00pm	Cocktail Reception