

Forbes | SHOOK
ON THE ROAD
New York Hilton Midtown

#ForbesSHOOK

Tuesday, April 30, 2024

TIME	SESSION & SPEAKER
1:00 – 1:10pm	Leading With Purpose <ul style="list-style-type: none">• R.J. Shook, Co-Founder & President, SHOOK Research & Senior Forbes Contributor
1:10 – 1:20pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Gerard Klingman, Klingman & Associates• Tom Klingman, Klingman & Associates• Moderator: Kelly Boucher, Head of Alternative Investment Specialists, T. Rowe Price• <i>Intro: Lindsey Nacht, Vice President Director of Operations, SHOOK Research</i>
1:20 – 1:40pm	Navigating the End of the Easy Money Era: Opportunities, Risks & Helping Clients Keep Emotions in Check <ul style="list-style-type: none">• Chris Davis, Chairman & Portfolio Manager, Davis Advisors• <i>Intro: Reed Finley, Regional Director, Davis Advisors</i>
1:40 – 1:55pm	Opportunities in Real Estate: Tax Advantaged Income in Triple Net Lease <ul style="list-style-type: none">• Meghan Donoghue, Principal, Real Estate Portfolio Strategist, Blue Owl• Moderator: Andrew Billingham, Merrill Wealth Management• <i>Intro: Robert Demert, Regional Market Leader, Blue Owl Capital</i>
1:55 – 2:15pm	Private Credit: An Evolving Market's Benefits for High-Net-Worth Clients <ul style="list-style-type: none">• Glenn August, Founder & CEO of Oak Hill Advisors• Moderator: Brian Holzer, Managing Director, Head of Sales for the Alternative Investments Group, Morgan Stanley Wealth Management• <i>Intro: Jennifer Kulp, Vice President of Group, Institutional & Private Wealth Consultant, T. Rowe Price</i>
2:15 – 2:30pm	Future of Our Practice <ul style="list-style-type: none">• Robb Baldwin, Founder, President & CEO, TradePMR• Marc Horner, Fairhaven Wealth Management
2:30 – 2:50pm	Optimizing Equity: Balancing Public-Private Allocations <ul style="list-style-type: none">• Christopher James, Chairperson, Blackstone Private Equity Strategies• Moderator: Anthony Dertouzos, Morgan Stanley Private Wealth Management• <i>Intro: Jeanette Pieper, Managing Director, Blackstone Private Wealth Solutions</i>
2:50 – 3:10pm	Municipals: Mispriced & Misunderstood, Why the Current Environment Presents a Unique Opportunity <ul style="list-style-type: none">• Mark Paris, Chief Investment Officer, Head of Municipals, Invesco• Moderator: Kathleen Entwistle, Morgan Stanley Private Wealth Management• <i>Intro: Allyson Jarecky, Senior Advisor Consultant, Invesco</i>
3:10 – 3:30pm	2024: Coming Back to Reality <ul style="list-style-type: none">• Strider Elass, Senior Economist, First Trust Portfolios
3:30 – 3:45pm	Networking Break
3:45 – 4:00pm	Navigating Opportunities in the Evolving Tech Landscape: AI <ul style="list-style-type: none">• Sonu Kalra, Portfolio Manager, Fidelity Investments• Moderator: Todd Forman, Morgan Stanley Private Wealth Management• <i>Intro: David Harvey, Regional Director, Fidelity Investments</i>
4:00 – 4:20pm	Avoiding Another Lost Decade in Equities <ul style="list-style-type: none">• Richard Bernstein, CEO & CIO, Richard Bernstein Advisors• <i>Intro: Rocco Scanniello, Director, Advisor Solutions Group, Janus Henderson Investors</i>
4:20 – 4:25pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Ken Gunsberger, UBS Wealth Management• <i>Intro: Keevana St. Aubin, Associate VP Advisor Services, SHOOK Research</i>
4:25 – 4:45pm	The Implications of Private Alternatives in Your Practice <ul style="list-style-type: none">• Jeff Brooks, JD, Senior Wealth Strategist, Janus Henderson Investors• Lara Castleton, U.S. Head of Portfolio Construction & Strategy, Janus Henderson Investors• Moderator: Eric Ring, Divisional Sales Head, Janus Henderson Investors• <i>Intro: George Stanevich, Director, Advisor Solutions Group, Janus Henderson Investors</i>

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4:45 – 5:00pm

Market Outlook: Navigating the Four Big Themes

- **Matthew Bartolini**, Head of SPDR® Americas Research, State Street Global Advisors
- Moderator: **Gary Wayne**, Center Street Capital Advisors, Wells Fargo Advisors Financial Network
- *Intro: **Laura Katic**, Vice President & Regional Consultant, State Street Global Advisors*

5:00 – 5:05pm

SHOOK Ones: My Best Idea

- **Richard Salvino**, Merrill Private Wealth Management
- *Intro: **LoriAnn LaSalle**, Vice President | Business Manager, SHOOK Research*

5:05 – 5:20pm

AI Doesn't Rhyme with Dotcom

- **Scott Helfstein**, Head of Investment Strategy, Global X ETFs
- Moderator: **Sascha Garzarella**, Morgan Stanley Private Wealth Management
- *Intro: **Mike Jennings**, Regional Director, Global X ETFs*

5:20 – 5:30pm

The Last Word

- **Frank Berland**, Managing Partner, SHOOK Research

5:30 – 6:30pm

Cocktail Reception hosted by T. Rowe Price / Oak Hill Advisors

6:30pm

Dine-Arounds with Partners