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New York Hilton Midtown

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Tuesday, April 30, 2024

TIME	SESSION & SPEAKER
1:00 – 1:10pm	**Leading With Purpose** • R.J. Shook, Co-Founder & President, SHOOK Research & Senior Forbes Contributor
1:10 – 1:20pm	**SHOOK Ones: Our Teams Best Idea** • Gerard Klingman, Klingman & Associates • Tom Klingman, Klingman & Associates • Moderator: Kelly Boucher, Head of Alternative Investment Specialists, T. Rowe Price
1:20 – 1:40pm	**Navigating the End of the Easy Money Era: Opportunities, Risks & Helping Clients Keep Emotions in Check** • Chris Davis, Chairman & Portfolio Manager, Davis Advisors • *Intro: Reed Finley, Regional Director, Davis Advisors*
1:40 – 1:55pm	**Opportunities in Real Estate: Tax Advantaged Income in Triple Net Lease** • Meghan Donoghue, Principal, Real Estate Portfolio Strategist, Blue Owl Capital • Moderator: Andrew Billinghurst, Merrill Wealth Management • *Intro: Robert Demert, Regional Market Leader, Blue Owl Capital*
1:55 – 2:15pm	**Private Credit: An Evolving Market's Benefits for High-Net-Worth Clients** • 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 • *Intro: Jennifer Kulp, Vice President of Group, Institutional & Private Wealth, T. Rowe Price*
2:15 – 2:30pm	**Igniting a Firm's Organic Growth** • Robb Baldwin, Founder, President & CEO, TradePMR • Marc Horner, Fairhaven Wealth Management
2:30 – 2:50pm	**Optimizing Equity: Balancing Public-Private Allocations** • Christopher James, Chairperson, Blackstone Private Equity Strategies • Moderator: Anthony Dertouzos, Morgan Stanley Private Wealth Management • *Intro: Jeanette Pieper, Managing Director, Blackstone Private Wealth Solutions*
2:50 – 3:10pm	**Municipals: Mispriced & Misunderstood, Why the Current Environment Presents a Unique Opportunity** • Mark Paris, Chief Investment Officer, Head of Municipals, Invesco • Moderator: Kathleen Entwistle, Morgan Stanley Private Wealth Management • *Intro: Allyson Jarecky, Senior Advisor Consultant, Invesco*
3:10 – 3:30pm	**2024: Coming Back to Reality** • Strider Elass, Senior Economist, First Trust Portfolios • *Intro: Luke Wynsma, Vice President, First Trust Portfolios*
3:30 – 3:45pm	**Networking Break**
3:45 – 4:00pm	**Navigating Opportunities in the Evolving Tech Landscape: AI** • Sonu Kalra, Portfolio Manager, Fidelity Investments • Moderator: Todd Forman, Morgan Stanley Private Wealth Management • *Intro: David Harvey, Regional Director, Fidelity Investments*

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4:00 – 4:20pm **Avoiding Another Lost Decade in Equities**

- Michael Contopoulos, Director of Fixed Income, Richard Bernstein Advisors
- *Intro: Rocco Scanniello, Director, Advisor Solutions Group, Janus Henderson Investors*

4:20 – 4:25pm **SHOOK Ones: My Best Idea**

- Ken Gunsberger, UBS Wealth Management

4:25 – 4:45pm **The Implications of Private Alternatives in Your Practice**

- 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
- *Intro: George Stanevich, Director, Advisor Solutions Group, Janus Henderson Investors*

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

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**