

Forbes | SHOOK

ON-THE-ROAD

Hyatt Regency, San Francisco

Tuesday,
March 7, 2023

TIME	SESSION & SPEAKER
12:00-12:10 pm	We're Here on Purpose — R.J. Shook , Co-Founder & President, SHOOK Research & Senior Forbes Contributor
12:10-12:15 pm	SHOOK Ones - My Best Idea — Beth Scanlan , Morgan Stanley Private Wealth Management — Lindsey Nacht , Senior Associate VP Director of Research, SHOOK Research
12:15-12:35 pm	Market Outlook: The Great Balancing Act — Mike Arone , Chief Investment Strategist, State Street Global Advisors SPDR ETFs — Moderator: Xi Qiao , UBS Wealth Management — Luke Hayes , Vice President, Regional Consultant, State Street Global Advisors SPDR ETFs
12:35-12:55 pm	Income'ing! What is Expected for Fixed Income in 2023 — Austin Stockfisch , Vice President, Fixed Income Portfolio Manager, First Trust
12:55-1:15 pm	The Power of Alternatives in Volatile Markets — Chris Sullivan , Sr. Managing Director, Blackstone Credit — David Levine , Sr. Managing Director, Blackstone Real Estate — Moderator: Matt Sheehan , Morgan Stanley Private Wealth Management — Michael Dupuis , Managing Director, Blackstone Private Wealth Solutions
1:15-1:20 pm	SHOOK Ones - My Best Idea — Eddie Zalayet , Wells Fargo Advisors — Erick Lopez , Senior Analyst, SHOOK Research
1:20-1:40 pm	Wealth Advisor's Guide — Matt Sommer , Head of Specialist Consulting Group, Janus Henderson Investors — Chris Fiacco , Divisional Sales Head, Janus Henderson Investors
1:40-2:00 pm	Refreshment Break
2:00-2:20 pm	Team Structures and Efficiencies — Jeffrey Ting , Merrill Lynch Wealth Management — Jason Ting , Merrill Lynch Wealth Management — Michael Schweitzer , Head of Retail Distribution, Janus Henderson Investors — Madison Rizzo , Analyst, SHOOK Research
2:20-2:25 pm	SHOOK Ones - My Best Idea — Kelly Milligan , Quorum Private Wealth — Travis Childrey , Sr. Associate VP Events, SHOOK Research
2:25-2:45 pm	Market Regime Change – Identifying Risks and Opportunities — Brendan Mulhern , Global Strategist, Newton Investment Management
2:45-3:05 pm	Fireside Chat with Silicon Valley Tech Insider — Julien Gaertner , Equity Investment Analyst, Capital Group, Home of American Funds — Mike Stern , Wealth Management Consultant, Capital Group, Home of American Funds
3:05-3:25 pm	Leveraging Industry Insights to Optimize Top-Performing Practices — Todd Barney , Market Leader, Senior Advisor Consultant, Invesco

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SESSION & SPEAKER

3:25-3:45 pm

Creating the Right Team Structure

— **Ben Fort**, Merrill Lynch Wealth Management

— **John Lin**, Morgan Stanley Wealth Management

— Moderator: **Dominic Bilotti**, Regional Consultant, State Street Global Advisors
SPDR ETFs

3:45-4:00 pm

The Last Word

— **Frank Berland**, CManaging Partner, SHOOK Research

4:00-5:00 pm

Cocktail Reception

Dine-arounds with Partners Following