

Forbes | SHOOK

ON THE ROAD

Maybourne Beverly Hills

#ForbesSHOOK

Thursday, March 7, 2024

TIME	SESSION & SPEAKER
12:00 – 12:10pm	Leading With Purpose <ul style="list-style-type: none">• R.J. Shook, Co-Founder & President, SHOOK Research & Senior Forbes Contributor
12:10 – 12:15pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Brian Firing, Wells Fargo Advisors• <i>Intro: Erick Lopez, Associate VP of Research, SHOOK Research</i>
12:15 – 12:35pm	Municipals: Mispriced & Misunderstood, Why the Current Environment Presents a Unique Opportunity <ul style="list-style-type: none">• Stephanie Larosiliere, Senior Client Portfolio Manager, Head of Municipal Business Strategies & Development, Invesco• Moderator: Kerry Bubb, KWB Wealth
12:35 – 12:55pm	Private Equity: Investing Through Today's Evolving Landscape <ul style="list-style-type: none">• Tom Morrison, Senior Managing Director & Co-President, Blackstone Private Equity Strategies• Moderator: Bill Tugurian, Managing Director, Blackstone Private Wealth Solutions• <i>Intro: Joe Lehrer, Head of U.S. Retail Sales, Blackstone Private Wealth Solutions</i>
12:55 – 1:15pm	2024: Coming Back to Reality <ul style="list-style-type: none">• Strider Elass, Senior Economist, First Trust Portfolios
1:15 – 1:20pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Aric Zamel, UBS Private Wealth Management• <i>Intro: Jordan Merrill, Associate VP, Research Manager</i>
1:20 – 1:40pm	Market Outlook: Testing Resilience <ul style="list-style-type: none">• Mike Arone, Chief Investment Strategist, State Street Global Advisors SPDR• Moderator: Katy Zhao, Morgan Stanley Wealth Management• <i>Intro: Darius Tandy, Vice President, State Street Global Advisors SPDR</i>
1:40 – 2:00pm	Opportunities in Private Credit <ul style="list-style-type: none">• William H. Bohnsack, Jr., President & Senior Portfolio Partner, Oak Hill Advisors• Moderator: Damien Bisserier, Co-CIO, Evoke Advisors• <i>Intro: Kelly Boucher, Head of Alternative Investment Specialists, T. Rowe Price</i>
2:00 – 2:15pm	Networking Break
2:15 – 2:35pm	Avoiding Another Lost Decade in Equities <ul style="list-style-type: none">• Richard Bernstein, CEO & CIO, Richard Bernstein Advisors• <i>Intro: Peter MacEntee, West Divisional Head, Janus Henderson Advisors</i>
2:35 – 2:50pm	Team Profile <ul style="list-style-type: none">• Seth Haye, Morgan Stanley Wealth Management• Moderator: Nick Cirbo, Senior Advisor Consultant, Invesco• <i>Intro: Luke Bartow, Associate VP of Event Programming, SHOOK Research</i>
2:50 – 3:10pm	Why Muni's Now <ul style="list-style-type: none">• John Miller, Head & Chief Investment Officer of the High Yield Municipal Credit Team, First Eagle• Moderator: Jon Neuhaus, Morgan Stanley Private Wealth Management
3:10 – 3:30pm	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• <i>Intro: Bill Kennedy, Director, Advisor Solutions Group, Janus Henderson Advisors</i>
3:30 – 3:50pm	AI and it's Investment Potential <ul style="list-style-type: none">• Pedro Palandrani, VP & Director of Research, Global X ETFs• Moderator: Ari Shandling, Morgan Stanley Wealth Management

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3:50 – 4:10pm

Opportunities in Real Estate: Tax Advantaged Income in Triple Net Lease

- [Gary Rozier](#), Managing Director, Real Estate, Blue Owl Capital
- Moderator: [Drew Freides](#), UBS Private Wealth Management

4:10 – 4:30pm

Top Teams – How we are Achieving Growth

- [Reza Zafari](#), Merrill Private Wealth Management
- [Jeffrey Germain](#), Wells Fargo Advisors
- Moderator: [Michael Schweitzer](#), Head of Retail Distribution, Janus Henderson Investors

4:30 – 4:35pm

The Last Word

- [Frank Berland](#), Managing Partner, SHOOK Research

4:35 – 5:35pm

Cocktail Reception

5:35pm

Dine-Arounds with Partners