

Forbes | SHOOK
ON THE ROAD
Hyatt Regency San Francisco

#ForbesSHOOK

Tuesday, March 5, 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">• Cheryl Young, Rockefeller Global Family Office• <i>Intro: Lindsey Nacht, Vice President, Director of Operations, SHOOK Research</i>
12:15 – 12:35pm	Opportunities in Real Estate: Tax Advantaged Income in Triple Net Lease <ul style="list-style-type: none">• Meghan Donoghue, Real Estate Portfolio Strategist, Blue Owl Capital• Moderator: Willis Davis, Morgan Stanley Private Wealth Management
12:35 – 12:55pm	2024: Coming Back to Reality <ul style="list-style-type: none">• Strider Elass, Senior Economist, First Trust Portfolios
12:55 – 1:00pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Brooks Hays Slate, Cresset Asset Management
1:00 – 1:20pm	Opportunities in Private Credit <ul style="list-style-type: none">• William H. Bohnsack, Jr., President & Senior Portfolio Partner, Oak Hill Advisors• Moderator: Doug Keller, Head of Alternatives, T-Rowe Price• <i>Intro: Kelly Boucher, Head of Alternative Investments Specialist, T. Rowe Price</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: Paul Minasian, Morgan Stanley Wealth Management• <i>Intro: Dominic Bilotti, Regional Consultant, State Street Global Advisors SPDR</i>
1:40 – 1:55pm	Networking Break
1:55 – 2:15pm	Team Structure and Career Pathways <ul style="list-style-type: none">• Ylisa Sanford, Morgan Stanley Wealth Management• Andrew Le, UBS Wealth Management• Moderator: Alec Morrison, Vice President & Market Leader, Invesco
2:15 – 2:35pm	Municipals: Mispriced & Misunderstood, Why the Current Environment Presents a Unique Opportunity <ul style="list-style-type: none">• Michael Camarella, Senior Portfolio Manager, Municipal Bond Team, Invesco• Moderator: Sandra Wang, Morgan Stanley Wealth Management
2:35 – 2:40pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Louis F. Batmale, Alders Financial Solutions, LPL Financial• <i>Intro: Madison Rizzo, Senior Analyst, SHOOK Research</i>
2:40 – 3:00pm	AI and Its Investment Potential <ul style="list-style-type: none">• Pedro Palandrani, VP & Director of Research, Global X ETFs• Moderator: Daphne Chi, UBS Wealth Management
3:00 – 3:20pm	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: Michael Dupuis, Managing Director, Blackstone Private Wealth Solutions• <i>Intro: Joe Lohrer, Head of U.S. Retail Sales, Blackstone Private Wealth Solutions</i>
3:20 – 3:40pm	Avoiding Another Lost Decade in Equities <ul style="list-style-type: none">• Richard Bernstein, CEO & CIO, Richard Bernstein Advisors• <i>Intro: Bill Eismann, Portfolio Specialist, Richard Bernstein Advisors</i>
3:40 – 3:55pm	Team Structure and Growth <ul style="list-style-type: none">• Mike Burbank, Morgan Stanley Private Wealth Management• Alex Oberle, Morgan Stanley Wealth Management• Moderator: Dominic Bilotti, Regional Consultant, State Street Global Advisors SPDR

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3:55 – 4:00pm

The Last Word

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

4:00 – 5:00pm

Cocktail Reception

5:00pm

Dine-Arounds with Partners