

Forbes SHOOK
**TOP WOMEN
 ADVISOR**

SUMMIT

Eau Palm Beach Resort & Spa | Manalapan, FL

May 30 – June 2, 2023

CE Credits offered: 10 IMCA, 6.5 CFP

#ForbesShookTopWomen

Tuesday, May 30, 2023

TIME	SESSION & SPEAKER	LOCATION
12:00-6:00pm	Registration	Registration Hall
6:00-9:00pm	Pre-Party	Courtyard Lawn

Wednesday, May 31, 2023

10:00am-5:00pm	Registration	Registration Hall
3:00-3:30pm	Finatical Curiosity — Lisa Kueng , Managing Director, Business Development, Invesco Global Consulting — Rona Gilbert , Senior Vice President, Divisional Sales Director, Invesco US	Plaza Ballroom
3:30-3:50pm	Inspiring Women: Growing Your Practice and Impact — Jennifer Tarsney , Managing Director, Advisor Advancement Institute, New York Life Investments	
3:50-4:30pm	SHOOK@ Showdown – Best Idea Competition — Amy Schoenherr , SVP, Director of FA & Manager Recognition, Wells Fargo Advisors — Ellen Bailey , Head of Advisor Development, Morgan Stanley Wealth Management — Steve Samuels , Managing Director, Merrill Lynch Wealth Management	
5:30-6:30pm	Cocktail Reception	Ocean Ballroom
6:30-8:00pm	Gala Dinner	Grand Ballroom
6:45-7:00pm	Welcome to Our Very Special Event — Liz Shook , Co-Founder & COO, SHOOK Research	
7:00-7:15pm	The Second Second — R.J. Shook , Co-Founder & President, SHOOK Research, Senior Forbes Contributor	
7:30-8:00pm	Washington Watch – A Discussion on Politics, Policy and the Economy — Libby Cantrill , Head of Public Policy, PIMCO — Lindsay Hans , President & Co-Head, Merrill Lynch Wealth Management — Ivana Knezevic , Executive Vice President, Strategic Accounts, PIMCO	

Thursday, June 1, 2023

7:00-8:00am	Breakfast	Flagler Hall
8:00am-4:00pm	Registration	Registration Hall
8:00-8:10am	Coffee with Lizzy — Liz Shook , Co-Founder & COO, SHOOK Research	Grand Ballroom
8:10-8:20am	SHOOK Ones: My Best Idea — Kara Scannell , Ameriprise Financial Services — Moderator: Jennifer Povlitz , UBS Division Director, Wealth Management USA	
8:20-8:40am	Building a Purposeful Practice — Becky Anderson , Edward Jones — Mary Mullin , Merrill Lynch Wealth Management — Moderator: Ken Correa , Head of Business and Client Development, Merrill Lynch Wealth Management — Janice Musselwhite , Senior Vice President, Gabelli Asset Management	

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TIME	SESSION & SPEAKER	LOCATION
8:40-8:55am	Bright Spots and Stormy Skies: The Economic Outlook in This Unique Business Cycle — Lara Rhame , Chief U.S. Economist, FS Investments — Moderator: Linda Modico , UBS Wealth Management — Kirsten Pickens , Managing Director & Co-Head of U.S. Distribution, FS Investments	Grand Ballroom
8:55-9:15am	Standing Strong	
9:15-9:30am	Refreshment Break	Flagler Hall
9:30-10:00am	Benefits of Infrastructure in a Client's Portfolio — Tara Davies , Partner, Global Head of Core Infrastructure & Co-Head of European Infrastructure, KKR — Paula Campbell Roberts , Managing Director & Chief Investment Strategist, Private Wealth Partners, KKR — Moderator: Anna Winderbaum , Morgan Stanley Private Wealth Management — Corry Hyer , Director & NY Regional Manager, KKR	Grand Ballroom
10:00-10:10am	Fearless: Women's Role in Driving Wealth — Lara Roman , Market Leader, Private Wealth Management, State Street Global Advisors SPDR ETFs	
10:10-10:25am	Conversation with America's #1 Woman Advisor — Colleen O'Callaghan , J.P. Morgan Wealth Management — Moderator: Shareen Luze , Head, Culture, & Field Experience, RBC Wealth Management — Keeyana St. Aubin , Senior Analyst, SHOOK Research	
10:25-10:45am	Harness Your Superpowers: Key Strategies That Drive Client Acquisition & Growth — Kim Hansen , Founder, VersiFi Private Wealth — Nedra Agnew , Merrill Lynch Wealth Management — Moderator: Kimberly Sanders , Senior Vice President, Strategic Wealth Services, LPL Financial — Kadi Simile , Vice President Structured Solutions, CAIS	
10:45-11:05am	International Investing: Navigating New Realities — Emily Liao , Equity Investment Director, Capital Group, Home of American Funds — Moderator: Angelia Hunter , Senior Vice President & Sales Development Manager, Capital Group, Home of American Funds	
11:05-11:10am	SHOOK Ones: My Best Idea — Nelrae Ali , Wells Fargo Advisors — Callie Almes , Senior Associate VP Project Leader, SHOOK Research	
11:10-11:30am	Translating Passion into Purpose: Liz Elting in Her Own Words — Liz Elting , Founder & CEO, The Elizabeth Elting Foundation — Moderator: Wendy Holmes , UBS Private Wealth Management — Crista Demasi , Managing Director, Head of Strategic Accounts For Wires And Global Banks, Invesco U.S.	
11:30-11:45am	Snack Break / Transition to Roundtables	Flagler Hall
11:45am-12:35pm	Roundtables	Plaza I, Plaza II, Ocean I, Ocean II
12:35-12:45pm	Transition to Lunch	Grand Ballroom
12:45-1:45pm	Lunch — Paula Schneider , President & CEO, Susan G. Komen	
12:50-12:55pm	Forbes SHOOK Directory Exclusive Offer — Becky Durst , Senior Associate Director, Advisor Solutions, Janus Henderson Investors	

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12:55-1:15pm	Trends in Luxury Travel 2023 — Michael Solomon , Forbes Life Editor — Moderator: Audree Begay , Ameriprise Financial Services	Grand Ballroom
1:45-2:05pm	Misconceptions and Realities: The State of the Current Real Estate Cycle — Dana Petitto , Managing Director, Real Estate, Brookfield Oaktree Wealth Solutions — Moderator: Katie Hancock , Morgan Stanley Wealth Management — Nicole Pecoraro , Senior Vice President, Brookfield Oaktree Wealth Solutions	
2:05-2:25pm	Looking Forward: Succession Planning — Mary Jo Harper , Merrill Lynch Wealth Management — Mary Sexton , Morgan Stanley Wealth Management — Moderator: Caroline Gundeck , Managing Director & Head of PWM Client and Field Engagement, Morgan Stanley Wealth Management — Allison Straub , Vice President, Capital Group, Home of American Funds	
2:25-2:35pm	Refreshment Break	Flagler Hall
2:35-2:55pm	The Risk of Being Too Comfortable — Liz Dennis , Head of Private Wealth Management, Morgan Stanley Wealth Management — Moderator: Mary DiChristofano , Morgan Stanley Private Wealth Management — Debbie Michaelson , Principal, Blackstone Private Wealth Solutions	Grand Ballroom
2:55-3:15pm	Portfolio Construction and Strategy: Trends and Opportunities — Lara Reinhard , U.S. Head of Portfolio Construction and Strategy, Janus Henderson Investors — Diane Snowden , Head of the Advisor Solutions Group, Janus Henderson Investors	
3:15-3:35pm	Reflection, Regulation, Fueling, Sleep, and Movement—What Works! — John Stemmerman , Senior Vice President & Head of Performance Talent, EXOS — Genevra Czech , Director of Client Value-Add Programs, FS Investments	
3:35-3:40pm	SHOOK Ones: My Best Idea — Lisa Howe , NEST Capital, Wells Fargo Advisors Financial Network — Jenny DeSeno , Associate VP Project Leader, SHOOK Research	
3:40-3:55pm	Capturing the Upside: Strategies for Commodities Investing Now — Al Chu , Portfolio Manager, Newton Investment Management — Moderator: Cynthia Chamberlayne , Senior Investment Consultant, BNY Mellon Investment Management	
3:55-4:10pm	Snack Break	Flagler Hall
4:10-4:30pm	Breaking the Glass Ceiling — Missy Spickler , Merrill Lynch Wealth Management — Leslie Lauer , UBS Private Wealth Management — Moderator: Heather Crist , Head of Field Engagement, UBS Wealth Management USA — Rona Gilbert , Senior Vice President, Divisional Sales Director, Invesco U.S.	Grand Ballroom
4:30-4:50pm	The Longevity of Money — Jeannie Underwood-Kotner , Senior Vice President & Head of Global Atlantic Consulting, Global Atlantic Financial Group	
4:50-5:30pm	Technological Convergence: Creating the Opportunity for Super-Exponential Growth — Cathie Wood , CEO & CIO, ARK Investment — Ali Urman , Genomic Revolution Analyst, ARK Investment — Moderator: Rebecca Burke , Vice President & Product Specialist, ARK Investment	

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TIME	SESSION & SPEAKER	LOCATION
5:30-5:35pm	One More Thing... — Frank Berland , Managing Partner, SHOOK Research	
5:35-6:30pm	Cocktail Reception	The Courtyard Lawn
6:30pm	Dine-arounds with Partners	

Friday, June 2, 2023

TIME	SESSION & SPEAKER	LOCATION
7:30-8:30am	Breakfast	Flagler Hall
8:30-8:40am	Good Morning...More Coffee Please! — Liz Shook , Co-Founder & COO, SHOOK Research	Grand Ballroom
8:40-8:45am	SHOOK Ones: My Best Idea — Ali Phillips , Obermeyer Wood Investment Counsel — Lindsey Nacht , Senior Associate VP Director of Research, SHOOK Research	
8:45-9:05am	Where You Invest Matters — Kathleen McCarthy , Global Co-Head of Real Estate, Blackstone — Moderator: Julie Shechtman , Morgan Stanley Wealth Management — Jeanette Pieper , Managing Director, Blackstone Private Wealth Solutions	
9:05-9:25am	Building a Team to Outlast You — Patricia Baum , RBC Wealth Management — Patti Brennan , Key Financial, Inc. — Moderator: Jennifer Tarsney , Managing Director, Advisor Advancement Institute, New York Life Investments — Jordan Merrill , Senior Analyst, SHOOK Research	
9:25-9:45am	Snack Break	
9:45-10:05am	Building the Team of the Future — Magay Shepard , Stifel — Michelle Mayer , Merrill Private Wealth Management — Moderator: Courtney Janssen , Principal, Blackstone Private Wealth Solutions — Madison Rizzo , Senior Analyst, SHOOK Research	
10:05-10:25am	The Bond Market Outlook in Today's Macro Climate — Tony Crescenzi , Portfolio Manager & Market Strategist, PIMCO — Cady Johnson , Divisional Sales Manager, U.S. Global Wealth Management, PIMCO	
10:25-10:45am	Deepening Relationships with Your Clients — Jessica Kartzinel , UBS Wealth Management — Robin Thomas , Truist — Wayne Roberts , Head Of New Market Opportunities, Edward Jones — Erick Lopez , Senior Analyst, SHOOK Research	
10:45-10:50am	SHOOK Ones – My Best Idea — Janene Pirbhai , Merrill Lynch Wealth Management — LoriAnn LaSalle , Senior Associate VP Business Manager, SHOOK Research	
10:50-11:00am	The Last Word — R.J. Shook , Co-Founder & President, SHOOK Research, Senior Forbes Contributor — Liz Shook , Co-Founder & COO, SHOOK Research	