Forbes SHOOK ON-THE-ROAD



el PRADO Hotel | Palo Alto, CA November 2, 2023

1:00-1:30pm	Welcome Remarks
	 Robert Bruno, Head of US Wealth Solutions, First Eagle Investments
1:30-1:40pm	We're Here on Purpose
	 R.J. Shook, Co-Founder & President, SHOOK Research, Senior Forbes Contributor
1:40-2:10pm	The Boom in Private Equity and the Growth of Private Lending
	Robert Hickey, Senior Managing Director and Deputy Chief Investment Officer of Tradable Credit, First Eagle Alternative Credit
	 Moderator: Pete Monty, Wirehouse & RIA Sales Manager, First Eagle Investments
	 Introduction: Madison Rizzo, Senior Analyst, SHOOK Research
2:10-2:20pm	Actionable Strategies from Top Teams
	 Antonio daRoza, Merrill Private Wealth Management
	 Moderator: Pete Monty, Wirehouse & RIA Sales Manager, First Eagle Investments
2:20-3:10pm	Cutting Through the Noise to Find Value
	 Matthew McLennan, Co-Head of the Global Value Team & Portfolio Manager, First Eagle Investments
	Moderator: Robert Bruno, Head of US Wealth Solutions, First Eagle Investments
3:10-3:25pm	Networking + Snack Break
3:25-3:35pm	Actionable Strategies from Top Teams
	James Marchetti, Rockefeller Capital Management
	Moderator: Suzanne Hingel, Senior Advisor Consultant, First Eagle Investments
3:35-4:15pm	Deciphering Quality from Speculative Momentum
	 Manish Gupta, Global Value Team Portfolio Manager & Senior Research Analyst, First Eagle Investments
	Moderator: Suzanne Hingel, Senior Advisor Consultant, First Eagle Investments
4:15-4:25pm	Actionable Strategies from Top Teams
	Vincent Sunzeri, Morgan Stanley Wealth Management
	 Moderator: Grace Holzer, Advisor Consultant, First Eagle Investments
4:25-4:55pm	Small Companies, Big Ideas
	 Bill Hench, Head of Small Cap Team and Portfolio Manager, First Eagle Investments
	 Moderator: Grace Holzer, Advisor Consultant, First Eagle Investments
4:55-5:00pm	Closing Remarks
	 Robert Bruno, Head of US Wealth Solutions, First Eagle Investments
5:00-5:45pm	Cocktail Reception