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AGENDA

Monday, October 14, 2024

	REGISTRATION	**Brahms 1 & 2**
6:00 – 8:00pm	**Pre-Party @ La Cave, Hosted by First Trust**	

Tuesday, October 15, 2024

10:00am – 5:00pm	**REGISTRATION**	**Brahms 1 & 2**
2:00pm – 2:20pm	**Like It or Not, Crypto Is a Once-In-A-Generation Investment Opportunity** • **John Hoffman,** Head of Distribution & Partnerships, Grayscale • Moderator: **Alex Shahidi,** Co-CIO, Evoke Advisors	**Beethoven**
2:20 – 2:40pm	**Exit Planning and Concentrated Stock Solutions** • **Jason Bogardus,** Morgan Stanley Private Wealth Management • **Joel Greenblatt,** Managing Principal & Co-Chief Investment Officer, Gotham Asset Management	
2:40 – 3:05pm	**Fundamentals, Fear, and the Future** • **Richard Bernstein,** CEO & CIO, Richard Bernstein Advisors • **Tom Lee,** Managing Partner & Head of Research, Fundstrat Global Advisors • Moderator: **David Bahnsen,** The Bahnsen Group	
3:05 – 3:25pm	**Human Capital, Talent Acquisition, and Growth** • **Tracey Gluck,** J.P. Morgan Wealth Management • **Don d'Adesky,** Raymond James & Associates • Moderator: **Bert White,** SVP, Western Division Director, Raymond James & Associates Private Client Group	
3:25 – 3:35pm	**Snack Break**	
3:35 – 3:55pm	**Navigating Complex Wealth for UHNW Families** • **Cheryl Young,** Rockefeller Global Family Office • **Andy Timmerwilke**, Merrill Wealth Management • Moderator: **John Moninger,** Head of U.S. Distribution, Allspring Global Investments	
3:55 – 4:15pm	**Private Markets: Designing Portfolios for Resilience Across Market Cycles** • **Jay Wyckoff,** Managing Director and National Sales Manager, Blue Owl • Moderator: **Alvin Spencer,** Stifel • *Intro: **Treavor Mosbaugh,** Regional Market Leader, Southern California, Blue Owl*	
4:15 – 4:30pm	**Technology in Wealth Management, What's Ahead** • **James Taylor,** Morgan Stanley Wealth Management • **Craig Findley,** Venture Visionary Partners • Moderator: **Ron Insana,** CEO of i-Fi AI, Senior Analyst for CNBC	
4:30 – 4:50pm	**State of the U.S. Housing Market: Sizing the Opportunities** • **Josh Pristaw,** Head of Real Estate, Pretium • Moderator: **Charles Day,** UBS Private Wealth Management • *Intro: **Brian Abdoo,** Managing Director, Business Development, Pretium*	
4:50 – 5:20pm	**SHOOK® Best Idea Competition, presented by PGIM** • Judge: **Caroline Gundeck,** Managing Director, Head of Private Wealth Management, Client and Field Engagement, Morgan Stanley Wealth Management • Judge: **Krista Goryl,** Divisional Growth Director, Wells Fargo Wealth & Investment Management • Judge: **Jim Dilorenzo,** Senior Vice President, National Sales Manager, Broker-Dealer Division, PGIM Investments	
5:30 – 6:30pm	**COCKTAIL RECEPTION**	**Chopin Patio**
6:30pm	**GALA DINNER**	**Encore Ballroom**
6:45pm	**Welcome to Our Special Event** • **Liz Shook**, Co-Founder & COO, SHOOK Research	
6:55pm	**Introduction** • **Allison Bonds Mazza,** Head of Intermediary, Americas Wealth, State Street Global Advisors	
7:00pm	**The Group of 8** • **R.J. Shook,** Co-Founder & President, SHOOK Research, Senior Forbes Contributor	
7:25pm	**Political Landscape vs. Market Reaction** • **Ronald Temple,** Chief Market Strategist, Lazard Financial Advisory & Asset Management	

Wednesday, October 16, 2024

8:00am – 4:00pm	**REGISTRATION**	**Brahms 1 & 2**

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7:00 – 8:00am	**BREAKFAST**	**Promenade**
8:00 – 8:05am	**Good Morning!**	**Encore Ballroom**

7:00 – 8:00am — **BREAKFAST** — **Promenade**

8:00 – 8:05am — **Good Morning!** — **Encore Ballroom**
- **Frank Berland,** Managing Partner, SHOOK Research

8:05 – 8:10am — **SHOOK® Best Idea Competition Winner's Announcement, presented by PGIM**
- **Jim Dilorenzo,** Senior Vice President, National Sales Manager, Broker-Dealer Division, PGIM Investments

8:10 – 8:15am — **SHOOK Ones: My Best Idea**
- **Peter Rohr,** Merrill Private Wealth Management
- *Introduction: **Eileen Ward,** Vice President, Investment Consultant, Calamos*

8:15 – 8:30am — **Deepening Relationships and Client Acquisition (SIGNIFICANCE)**
- **Nestor Vicknair,** Merrill Wealth Management
- **Ross Mannino,** Ameriprise Financial Services
- Moderator: **Pat O'Connell,** EVP, Ameriprise Advisor Group & Ameriprise Financial Institutions Group
- *Intro: **Cynthia Chamberlayne**, Senior Investment Consultant, BNY Mellon Investment Management*

8:30 – 8:45am — **Normal or New Normal. That is the Question**
- **Brian Wesbury,** Chief Economist, First Trust Portfolios L.P.
- *Introduction: **Jon DiGiovanni,** Managing Director, SMAs & Direct Indexing, First Trust*

8:45 – 9:00am — **Investing in Our Daily Lives: The Infrastructure Behind AI, Data, Power and Transportation**
- **Tara Davies,** Partner, Global Head of Core Infrastructure & Co-Head of European Infrastructure, KKR
- Moderator: **Eric Snyder,** Merrill Wealth Management
- *Introduction: **Michael Savino,** Director in Global Client Solutions, KKR*

9:00 – 9:15am — **Century of Biotech: Capitalizing on the Biomedical Revolution**
- **Andy Acker,** Portfolio Manager for the Health Care and Biotech Teams, Janus Henderson Investors
- *Intro: **Tony Grigonis,** Divisional Sales Head, Janus Henderson Investors*

9:15 – 9:35am — **Saving Our Children**

9:35 – 9:50am — **REFRESHMENT BREAK**

9:50 – 10:05 am — **Tax-Efficient Investing Strategies for Tax-Aware Investors**
- **Brian Hetherington**, Merrill Private Wealth Management
- **David Skid,** Morgan Stanley Wealth Management
- **Brian Jacobs,** Head of Client Portfolio Management, PGIM Custom Harvest, PGIM Investments

10:05 – 10:20am — **Market Outlook: Resilience Under Pressure**
- **Michael Arone,** Chief Investment Strategist, State Street Global Advisors
- Moderator: **Ron Insana,** CEO of i-Fi AI, Senior Analyst for CNBC
- *Intro: **Dominic Bilotti**, Regional Consultant, State Street Global Advisors SPDR*

10:20 - 10:40am — **Team Structure and Compensation**
- **Michael Valdes,** Merrill Private Wealth Management
- **Richard Zinman,** Morgan Stanley Private Wealth Management
- Moderator: **Ken Correa,** Managing Director, Head of Business & Client Development, Merrill Wealth Management

10:40 – 10:55am — **Real Estate: Positioning for the Rebound**
- **Brian Kingston,** CEO, Real Estate, Brookfield Asset Management
- Moderator: **Mark Moore,** UBS Private Wealth Management
- *Intro: **Allison Williams,** Senior Vice President, Northeast Region, Brookfield Oaktree Wealth Solutions*

10:55 – 11:05am — **SHOOK Ones: My Best Idea**
- **Drew Freides,** UBS Private Wealth Management
- Moderator: **John Mathews,** Managing Director, Division Director and Head of Private Wealth Management, UBS Private Wealth Management

11:05 – 11:20am — **ABCs of the Easing Cycle: Anything but Cash**
- **Bob Michele,** Managing Director, Chief Investment Officer & Head of the Global Fixed Income, Currency & Commodities Group, J.P. Morgan Asset Management
- Moderator: Brian Pfeifler, Morgan Stanley Private Wealth Management
- *Intro: Jim George, Managing Director, Client Advisor, J.P. Morgan Asset Management*

11:20 – 11:35am — **Discerning Signals from Noise**
- **Emily Roland,** Co-Chief Investment Strategist, Manulife John Hancock Investments
- Moderator: **Xi Qiao,** UBS Private Wealth Management
- *Intro: **Kristie Feinberg,** President & CEO, Manulife John Hancock Investments*

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11:35 – 11:50am	**SNACK BREAK / TRANSITION TO BREAKOUTS**	
11:50am–12:25pm	**BREAKOUTS**	**Chopin 1-4**

Breakout #1: Empowering Business Owner Conversations
- **Andrew J. McFetridge,** Head of Strategic Investment Specialists, Manulife John Hancock Investments

Breakout #2: Crypto as an Asset Class: Portfolio Construction and Asset Allocation
- **Zach Pandl,** Managing Director, Research, Grayscale

Breakout #3: Team Compensation: Best Practices and Avoiding Pitfalls
- **Terry Cook**, Parcion Private Wealth
- **Eric Applewhite**, Morgan Stanley Wealth Management
- Moderator: **Paul Brunswick,** Head of Invesco Global Consulting, Invesco

Breakout #4: Building Portfolios with Alternatives
- **Duncan Rolph**, Miracle Mile Advisors
- **David Berdon,** Morgan Stanley Private Wealth Management
- Moderator: **Darby Nielson,** Fidelity Institutional Wealth Adviser LLC, Fidelity Investments

12:25pm	**LUNCH, Sponsored by J.P. Morgan Asset Management**	**Encore Ballroom**

J.P. Morgan Asset Management Congratulates America's Top Advisors
- **Mike Bailey,** National Sales Manager, Wealth Management Channel, J.P. Morgan Asset Management

Update: Saving Our Children
- **Elizabeth Crippen Allen,** Chief Executive Officer, Children's Cancer Research Fund

Insights From a Legend
- **Bill Miller III,** CFA, Managing Partner of Miller Family Office
- **Samantha McLemore,** Founder & CIO, Patient Capital Management
- Moderator: **Marvin McIntyre,** Morgan Stanley Private Wealth Management
- *Introduction: **Rebecca Kerner Reiss,** Head of Business Development & Investor Relations, Patient Capital Management*

Investing for Resilience: Trends and Opportunities in Private Credit
- **Lawrence Golub,** Chief Executive Officer, Golub Capital
- Moderator: **Ryan McClellan,** UBS Private Wealth Management
- *Intro: **Thomas Burt,** Managing Director, Head of Private Wealth Americas, Golub Capital*

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- *Introduction: **Paul Reiss,** Senior Vice President, Accolades & Strategic Partnerships, Forbes Media*

NETWORKING BREAK

Market Outlook and Investment Opportunities
- **Rick Rieder,** CIO of Global Fixed Income and Head of Global Allocation, BlackRock
- *Introduction: **Mark Oppedisano,** Director, U.S. Wealth Advisory, BlackRock*

1:40– 1:50pm	**REFRESHMENT BREAK / TRANSITION TO BREAKOUTS**	
1:50 – 2:20pm	**BREAKOUTS**	**Chopin 1–4**

Breakout #1: The State of Private Infrastructure
- **Nicholas Moller,** Managing Director, Investment Specialist, Infrastructure Investments Group, J.P. Morgan Asset Management

Breakout #2: Unlocking Tax Alpha for High-Net-Worth Investors
- **Brian Jacobs,** Head of Client Portfolio Management, PGIM Custom Harvest, PGIM Investments
- Moderator: **Jonathan Peters,** Morgan Stanley Wealth Management

Breakout #3: Top Advisors-Top Ideas
- **Michael Poppo,** UBS Wealth Management
- **Todd Silaika,** Merrill Wealth Management
- Moderator: **John Moninger,** Head of U.S. Distribution, Allspring Global Investments

Breakout #4: Finding your Niche: Opportunities in Alternative Credit
- **Claudio Macchetto,** Managing Director, GoldenTree Asset Management
- **Steve Kavulich,** Head of U.S. Opportunistic Private Credit, Nomura Capital Management
- **Jim Buccola,** Partner & Head of Structured Credit, Medalist Partners
- Moderator: **Kathleen Entwistle**, Morgan Stanley Private Wealth Management

2:20 – 2:30pm	**SNACK BREAK / RETURN TO GENERAL SESSION**	**Encore Ballroom**
2:30 – 2:45pm	**The Evolving Credit Landscape**	

AGENDA

	• **Mike Arougheti,** Co-Founder & CEO of Ares Management	
2:45 – 3:05pm	**Putting the Income Back in Fixed Income** • **Scott Zaleski,** Head of U.S. Multi-Sector Fixed Income & Senior Portfolio Manager of the BNY Mellon Core Plus Strategy at Insight Investment • **John Miller,** Head and Chief Investment Officer of the High Yield Municipal Credit Team, First Eagle Investments • Moderator: **Todd** Battaglia, MG&A Wealth	
3:05 – 3:10pm	**SHOOK Ones: My Best Idea** • **Richard Jones,** Merrill Private Wealth Management	
3:10 – 3:25pm	**Lessons from the Endowment Model** • **Joe Dowling,** Global Head of Blackstone Alternative Asset Management • Moderator: **Joe Lohrer,** Senior Managing Director & Head of U.S. Retail Sales, Blackstone Private Wealth Solutions	
3:25 – 3:40pm	**Multiomics: The Healthcare Revolution You're Not Exposed To** • **Cathie Wood,** CEO & CIO, ARK Investments • Moderator: **Rebecca Burke,** Vice President & Product Specialist, ARK Investments • *Intro: **Victor Kopelakis**, Regional Vice President, Sales, Resolute Investment Managers*	
3:40 – 3:50pm	**SHOOK Ones: My Best Idea** • **Seth Haye,** Morgan Stanley Wealth Management • Moderator: **Brian McDonald,** Managing Director | Head of Direct and Institutional Businesses, Morgan Stanley Wealth Management • *Intro: **John Blau**, Managing Director, Alkeon Capital Management*	
3:50 – 4:05pm	**Staying Ahead of the Curve: Fixed Income Perspectives** • **Mark Seidner,** CIO of Non-Traditional Strategies, PIMCO • Moderator: **Victor Livingstone,** Morgan Stanley Private Wealth Management • Intro: **Peter Prinstein,** Executive Vice President & Head of Private Client Group, PIMCO	
4:05 – 4:15pm	**REFRESHMENT BREAK**	
4:15 – 4:35pm	**GenAI: From Experimentation to Transformation** • **Beijia Ma,** Head of Equity Strategy, Alkeon Capital Management • **Scott Helfstein,** Head of Investment Strategy, Global X ETFs • Moderator: **Brian Werdesheim,** Oppenheimer	
4:35 – 4:40pm	**SHOOK One's: My Best Idea** • **Sara Wendt,** Miracle Mile Advisors	
4:40 – 5:00pm	**Where Opportunities Lie Domestically & Internationally** • **Megan France,** ETF Specialist, Capital Group | Home of American Funds • **Nick Kirrage,** Co-head of the Schroder Global Value Equities Team & Portfolio Manager of Hartford Schroders International Contrarian Value Fund	
5:00 – 5:15pm	**What's Ahead for the Markets and Economy** • **Prof. Jeremy Siegel,** Senior Economist to WisdomTree & Emeritus Professor at The Wharton School of the University of Pennsylvania • *Intro: **Andrew Tsiropinas**, Director, Sales, WisdomTree*	
5:15 – 5:35pm	**Unlocking Growth in your Private Equity Portfolio** • **Todd Sisitsky,** President of TPG Inc. & Co-Managing Partner, TPG Capital • **Liz Campbell,** Managing Director, Chief Investment Officer of Portfolio Advisors, FS Investments • Moderator: **Ron Insana,** CEO of i-Fi AI, Senior Analyst for CNBC	
5:35 – 5:55pm	**Winner's Circle – Lesson's from America's #1 Advisor** • **Jeff Erdmann,** Merrill Private Wealth Management • Moderator: **Paul Brunswick,** Head of Invesco Global Consulting, Invesco	
5:55 – 6:00pm	**Let's Get to Cocktails!** • **Frank Berland,** Managing Partner, SHOOK Research	
6:00 – 7:00pm	**COCKTAIL RECEPTION**	**Chopin Patio**
7:00pm	**DINE-AROUNDS WITH PARTNERS**	
	Thursday, October 17, 2024	
7:30 – 8:30am	**BREAKFAST**	**Promenade**
8:30 – 8:35am	**Welcome Remarks** • **Liz Shook**, Co-Founder & COO, SHOOK Research	**Encore Ballroom**
8:35 – 8:45am	**SHOOK Ones: My Best Idea** • **Jonathan Beukelman**, UBS Private Wealth Management	

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8:45 – 9:05am	The Next Chapter: Innovation, Opportunity, and the Future of Asset Management • **Jenny Johnson,** President & CEO, Franklin Templeton • Moderator: **Patti Brennan,** Key Financial • *Introduction: **Heather Lenseth,** SVP, Division Sales Manager, Northeast, Franklin Templeton*
9:05 – 9:25am	**Why She Chooses You - Women, Wealth, and Wisdom** • **Jeannie Underwood-Kotner,** Senior Vice President, Head of Global Atlantic Consulting
9:25 – 9:45am	**Unique Approaches to Attracting and Retaining Clients** • **Shawn Creger,** Creger Wealth Management, Edward Jones • **Laila Pence,** Pence Wealth Management, LPL Financial • Moderator: **Julian Lopez,** EVP of Relationship Management, LPL Financial
9:45 – 10:00am	**Succession Planning and How to Prepare** • **Nelrae Ali**, Array Private Investment Advisory Group | Wells Fargo Financial Network • **Scott Tiras**, Ameriprise Financial Services • Moderator: **Rob Dilbone,** Managing Director, Trade-PMR
10:00 – 10:15am	**REFRESHMENT BREAK**
10:15 – 10:30am	**Investing in Space & Defense Tech… an LP Perspective** • **Michael Smith**, Avidian Wealth • **Anup Swamy**. Maroon Pass • Moderator: **Phil Scully**, General Partner, Balerion Space Venture
10:30 – 10:50am	**New Ideas around Client Engagement** • **Charles Balducci,** Merrill Wealth Management • **Terry Cook,** Parcion Private Wealth • Moderator: **Michael Schweitzer,** Head of North America Client Group, Janus Henderson Investors
10:50 – 10:55am	**SHOOK Ones: My Best Idea**
10:55 – 11:00am	**The Last Word** • **R.J. Shook**, Co-Founder & President, SHOOK Research, Senior Forbes Contributor • **Liz Shook**, Co-Founder & COO, SHOOK Research