Forbes | SHOOK TOP ADVISOR SUMMIT

CE CREDITS AVAILABLE

TUESDAY, OCTOBER 14, 2025		
3:00pm – 7:30pm	REGISTRATION	CONVENTION LOUNGE
5:30pm – 7:30pm	Pre-Party at Jardín - Hosted by First Trust	JARDÍN

WEDNESDAY, OCTOBER 15, 2025		
10:00am – 5:00pm	REGISTRATION	CONVENTION LOUNGE
12:00pm – 12:25pm	**Tax Policy: What Your Clients Should Consider and Investment Strategies** • Holly Swan, Head of Wealth Solutions, Global Client Strategy, Allspring Global Investments • Nelson Scott, Vice President and High Net Worth Specialist, PGIM • Moderator: Brian Firring, Wells Fargo Advisors • *Intro: Lindsey Nacht, Vice President | Director of Operations, SHOOK Research*	BANDOL
12:25pm – 12:35pm	**SHOOK Ones: My Best Idea** • Peter Rohr, Merrill Private Wealth Management • Moderator: Allison Bonds, Mazza, Head of US Wealth, State Street Investment Management • *Intro: **Callie Askins**, Senior Associate VP | Project Leader, SHOOK Research*	
12:35pm – 12:55pm	**Conversation with Michael Patterson – Private Credit Markets** • Michael Patterson, Founding Partner, Co-President, HPS Investment Partners • Moderator: James Taylor, Morgan Stanley Private Wealth Management • *Intro: John Christmas, Co-Head of Business Development & Investor Relations, HPS Investment Partners*	
12:55pm – 1:15pm	**Demystifying Bitcoin: From Breakthrough to Mainstream** • Zach Pandl, Head of Research, Grayscale • Moderator: David Kudla, Mainstay Capital Management	
1:15pm – 1:40pm	**Value vs Momentum vs Growth** • Matthew McLennan, Co-Head of Global Value Team and Portfolio Manager, First Eagle Investments • Richard Bernstein, CEO & CIO, Richard Bernstein Advisors • Moderator: Jeffrey Swett, UBS Wealth Management • *Intro: Jordan Merrill, Associate VP | Research Manager, SHOOK Research*	
1:40pm – 2:00pm	**A U.S. Political and Economic Outlook** • Robert Stein, Deputy Chief Economist, First Trust	
2:00pm – 2:20pm	**The 8000 Days of Retirement** • Joseph Coughlin, PhD, Director of the MIT AgeLab, presented by Hartford Funds • Patti Brennan, Key Financial • Moderator: Bill McManus, Vice President & Managing Director, Hartford Funds • *Intro: Clinton Mains, Advisor Consultant, Hartford Funds*	
2:20pm – 2:35pm	SNACK BREAK	
2:35pm – 2:55pm	**Private Equity Outlook: Navigating Complexity, Creating Value & Building Stronger Businesses** • Matt Nord, Co-Head of Private Equity, Apollo • Moderator: Robert Chen, Morgan Stanley Private Wealth Management • *Intro: Nick Brakatselos, Director, Client and Product Solutions, Apollo*	
2:55pm – 3:15pm	**How Top Advisors Are Differentiating Their Practices** • Michael Chudd, UBS Private Wealth Management • David Hou, Evoke Advisors • Moderator: Paul Brunswick, Head of Invesco Global Consulting • *Intro: Chris Collie, Market Leader, Invesco*	
3:15pm – 3:20pm	**SHOOK Ones: Building a Championship Culture in Wealth Management** • Jeffrey Fratarcangeli, Fratarcangeli Wealth Management • *Intro: Jim Dilorenzo, Senior VP, National Sales Manager, Broker-Dealer Division, PGIM*	
3:20pm – 3:40pm	**Sports, Media & Entertainment: Investing in the Next Frontier** • Kort Schnabel, Partner, Co-Head of Sports, Media and Entertainment, Ares Management • Moderator: Michael Warr, Morgan Stanley Private Wealth Management	

3:40pm – 4:00pm	**Tax Alpha Amplified: Integrating Advanced Techniques in Portfolio Construction** • Jim Bergeron, Managing Director, Advisor Education, Nuveen • Katrina DiFiglia, Managing Director, Portfolio Strategist, Portfolio Strategy & Solutions, Nuveen • Moderator: Kelly Milligan, Quorum Private Wealth • *Intro: AJ Rea, VP, Market Leader, Nuveen*	
4:00pm – 4:20pm	**The Liquidity Benefits of Global Diversifications in Private Markets and Why There Is a Structural Alpha in Asia** • Jean Salata, Chairman of EQT Asia • Moderator: Christopher Toomey, Morgan Stanley Private Wealth Management • *Intro: Cort Escherich, Managing Director, EQT Partners*	
4:20pm – 4:40pm	**Thriving in the Great Bond Migration** • Raman Srivastava, Insight Investment CEO, BNY Investments • Moderator: Cynthia Chamberlayne, Senior Investment Strategist - Advisor Enablement, BNY Investments • *Intro: Michael Hurley, Senior Investment Consultant, BNY Investments*	
4:40pm – 5:00pm	**The Future of Industry Disruption from Vanguard, the Original Disruptor** • Janel Jackson, Principal, Head of Bank and Institutional, Financial Advisor Services Division, Vanguard • Moderator: Charles Parry, Wells Fargo Advisors • *Intro: Ryan Donohue, Market Leader, Broker-Dealer, Vanguard*	
5:00pm – 5:15pm	**Building Long-Term Wealth with a Tax-Aware Approach to Active Management** • John Huss, Principal, Head of Integrated Research & Co-Head Macro Strategies Group, AQR Capital Management	
5:15pm – 5:30pm	**SHOOK® Best Idea Competition** • Caroline Gundeck, Managing Director, Head of Client and Field Engagement, Morgan Stanley Wealth Management • Moderators: Frank Berland, Managing Partner, SHOOK Research and Liz Shook, Co-Founder & COO, SHOOK Research	
5:30pm – 6:30pm	**COCKTAIL RECEPTION, featuring PGIM WINE EXPERIENCE**	**EVENT PAVILION**
6:30pm	**GALA DINNER**	**CRISTAL BALLROOM**
6:45pm	**Welcome to Our Very Special Event** • Liz Shook, Co-Founder & COO, SHOOK Research	
7:00pm – 7:15pm	**This Is Who We Are** • R.J. Shook, Co-Founder & President, SHOOK Research, Senior Forbes Contributor	
7:25pm – 8:00pm	**Growing Wealth Through Sports Ownership** • Mark Cuban, President of Harbinger Sports Partners, Cost Plus Drugs & Mark Cuban Companies • Rashaun Williams, Chief Investment Officer of Harbinger Sports Partners, Atlanta Falcons Limited Partner • Moderator: Charles Balducci, Merrill Wealth Management • *Intro: Randall Lane, Chief Content Officer, Forbes*	

THURSDAY OCTOBER 16, 2025

7:00am – 4:00pm	**REGISTRATION**	**CONVENTION LOUNGE**
7:00am – 8:00am	**BREAKFAST**	**EXHIBIT HALL**
8:00am – 8:10am	**Good Morning!** • Frank Berland, Managing Partner, SHOOK Research	**CRISTAL BALLROOM**
8:10am – 8:20am	**SHOOK Ones: Engaging with Our Client's Children** • Todd Silaika, Merrill Wealth Management • Moderator: Ken Correa, Managing Director, Head of Business & Client Development, Merrill Wealth Management • *Intro: Aaron Howell, Alternative Investment Specialist, T. Rowe Price*	
8:20am - 8:35am	**Code to Cognition: Navigating the AI Revolution** • Robert F. Smith, Founder, Chairman & CEO, Vista Equity Partners • *Intro: Dan Parant, Managing Director, Global Head of Private Wealth, Vista Equity Partners*	

8:35am – 8:50am	**Opportunities in Private Equity: Making Our Own Luck** • Alisa Amarosa Wood, Partner & Co-CEO, KKR Private Equity Conglomerate • Moderator: Josh Metz, Managing Director, Head of Wirehouse and Platform Distribution, KKR • *Intro: Scott Manniello, Director, Western Divisional Head and Southwest Relationship Manager, KKR*	
8:50am – 9:05am	**The Masters List - Ideas from America's #1 Advisor** • Jeff Erdmann, Merrill Private Wealth Management • Moderator: Paul Brunswick, Head of Invesco Global Consulting • *Intro: Nick Cirbo, Market Leader, Invesco*	
9:05am – 9:20am	**The Next Step in AI: Where Should Investments Be Directed When Models Meet the Market?** • Joshua Cummings, PM, Consumer & Comms Sector Lead, Janus Henderson Investors • Moderator: Brett White, Ameriprise Financial Services • *Intro: Becky Durst, Director, Advisor Solutions Group, Janus Henderson Investors*	
9:20am – 9:40am	**Saving Our Children** • *Intro: Jessica Donahue, Senior Managing Director, Foundation Source*	
9:40am – 9:55am	REFRESHMENT BREAK	
9:55am – 10:10am	**Industry Trends, Leadership, and Corporate Culture** • Mike Gitlin, President and CEO, Capital Group • Moderator: John Mathews, Head of Private Wealth Management, UBS	
10:10am – 10:25am	**Where is Private Equity Going?** • Lawrence Golub, Chief Executive Officer, Golub Capital • Moderator: Alex Shahidi, Co-CIO, Evoke Advisors • *Intro: Thomas Burt, Managing Director, Head of Private Wealth Americas, Golub Capital*	
10:25am – 10:30am	**SHOOK Ones: My Best Idea** • Jonathan Beukelman, UBS Private Wealth Management • *Intro: Edward Nassar, Executive Director, Advisor Solutions Group, Janus Henderson Investors*	
10:30am – 10:45am	**The Wealth Management Private Markets Landscape** • Jenny Johnson, CEO, Franklin Templeton • Moderator: Katie Hancock, Morgan Stanley Wealth Management • *Intro: Dave Donahoo, Head of Americas - Wealth Management Alternatives, Franklin Templeton*	
10:45am – 11:00am	**Secondaries: A New World Order** • Vern Perry, Global Head of Blackstone Strategic Partners • Moderator: Michael Poppo, UBS Wealth Management • *Intro: Ryan McCracken, Managing Director, Blackstone Private Wealth*	
11:00am – 11:15am	**Introducing the Emotional Journey of the UHNW Client** • Ken Haman, Managing Director, Alliance Bernstein Advisor Institute • Moderator: Ben Klein, Merrill Wealth Management • *Intro: Rob Brazofsky, Vice President, Regional Manager NY City, Alliance Bernstein*	
11:15am – 11:30am	**Staying Ahead of the Curve – A Conversation with PIMCO Group CIO Dan Ivascyn** • Daniel Ivascyn, Group Chief Investment Officer, PIMCO • Moderator: Brian Pfeifler, Morgan Stanley Private Wealth Management • *Intro: Peter Prinstein, Executive Vice President & Head of Private Client Group, PIMCO*	
11:30am – 11:55am	SNACK BREAK / TRANSITION TO BREAKOUTS	
11:55am – 12:30pm	**Breakout #1: Transformational Conversations: Blueprints From America's Top Advisor Teams** • Chris Brady, Director of Practice Management and Strategic Client Relations, Pacific Life	AVIGNON
	Breakout #2: Bonds Are Great Again! Identifying the Best Opportunities in Fixed Income • Andy Melchiorre, Managing Director, Portfolio Manager, Global Fixed Income, Currency & Commodities, J.P. Morgan Asset Management	BANDOL 1
	Breakout #3: Developing Your Go-To-Market Strategy for Business Owners • Bobby Labadini, SVP, Divisional Sales Manager, Manulife John Hancock Investments	BANDOL 2

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Breakout #4: Returns and Resilience with Alternative Investments — MEURSAULT 1
- Claudio Macchetto, Managing Director, GoldenTree Asset Management
- Michael Ardisson, President & COO, Medalist Partners
- Kate Willsen, Senior Relationship Manager - Global Platforms, Millennium Management
- Moderator: Edmund Agresta, Morgan Stanley Wealth Management

12:30pm – 1:00pm **NETWORKING BREAK** — EXHIBIT HALL

1:00pm – 1:55pm **Lunch presented by Manulife John Hancock Investments** — CRISTAL BALLROOM

Manulife John Hancock Investments Congratulates America's Top Advisors
- *Intro: Jeff Duckworth, President of U.S. Distribution, Manulife John Hancock Investments*

Update: Saving Our Children
- Kenna Dooley, Chief Development Officer, Children's Cancer Research Fund

1:05pm – 1:25pm **A Fireside Chat with Cliff Asness**
- Cliff Asness, Founder, Managing Principal and Chief Investment Officer, AQR Capital Management
- Moderator: Jeremy Beal, Managing Director, Head of Investment Solutions, Morgan Stanley Wealth Management

1:25pm – 1:40pm **The Evolving Geopolitical Landscape with Lazard Senior Advisor, General John Abizaid**
- John P. Abizaid, Principal Partner, JPA Partners & Senior Advisor, Lazard's Geopolitical Advisory Group
- Moderator: Robert Forsyth, Managing Director, Global Head of ETFs, Lazard Asset Management
- *Intro: Kelly Ryan, Managing Director, National Sales Manager, Lazard Asset Management*

1:40pm – 1:55pm **Overview and Opportunities in Financial Markets**
- Rick Rieder, Chief Investment Officer of Global Fixed Income & Head of Global Allocation Investments, BlackRock
- *Intro: Ricardo Hartigan, Director, US Wealth Advisory, BlackRock*

1:55pm – 2:00pm **Forbes | SHOOK Leveraging Your Forbes Recognition**
- Paul Reiss, Senior Vice President, Accolades & Strategic Partnerships, Forbes Media

2:00pm – 2:10pm **REFRESHMENT BREAK / TRANSITION TO BREAKOUTS**

2:10pm – 2:40pm **Breakout #1: Direct Indexing: Unlock Tax Alpha for High-Net-Worth Investors** — AVIGNON
- Nelson Scott, Vice President and High Net Worth Specialist, PGIM
- Moderator: Steve Mangum, Merrill Wealth Management

Breakout #2: Incorporating Crypto in Diversified Portfolios — BANDOL 1
- Matt Murphy, SVP, National Accounts, Grayscale

Breakout #3: How High-Performing Teams Can Use AI as a Growth Driver — BANDOL 2
- Moderator: Brock Sutton, Head of Emerging Client Capabilities, Capital Group

Breakout #4: The "Super-Aged Society" What it May Mean for Real Estate — MEURSAULT 1
- Rob Nicholson, Vice President, US Wealth Advisory, BlackRock
- Moderator: Alan Litt, Principal, Co-Founder, and Board Member, MonticelloAM

2:40pm – 2:50pm **SNACK BREAK / TRANSITION TO GENERAL SESSION** — CRISTAL BALLROOM

2:50pm – 3:05 pm **Operational Skill: The Winning Edge in Today's Private Equity Landscape**
- David Nowak, President, Private Equity, Brookfield
- Moderator: Richard Zinman, Morgan Stanley Private Wealth Management
- *Intro: Dan McCulloch, Co-Head U.S. Wirehouse & IBD Sales, Brookfield Oaktree Wealth Solutions*

3:05pm – 3:30pm **Insights From Top Thought Leaders in the Industry**
- Emily Roland, Co-Chief Investment Strategist, Manulife John Hancock Investments
- Anastasia Amoroso, Chief Investment Strategist, Partners Group
- Moderator: Rob Sechan, CEO & Co-Founder, NewEdge Wealth
- *Intro: LoriAnn LaSalle, Vice President | Business Manager, SHOOK Research*

3:30pm – 3:50pm **Private Credit: Opportunities for Individual Investors in a Growing Market**
- Logan Nicholson, Senior Managing Director, Direct Lending Investment Team, Blue Owl
- Eric Muller, Portfolio Manager & Partner, Chief Executive Officer – BDCs, OHA
- Moderator: James Woldert, Morgan Stanley Wealth Management
- *Intro: Jacob Shook, Senior Analyst | Next-Gen Lead, SHOOK Research*

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3:50pm – 4:00 pm	**SHOOK Ones: My Best Idea** • Raj Sharma, Merrill Private Wealth Management • Moderator: Eric A. Schimpf, President, Merrill Wealth Management • *Intro: Jeff Duckworth, President of U.S. Distribution, Manulife John Hancock Investments*	
4:00pm – 4:15pm	**Private Equity in Focus: Identifying Bespoke Opportunities and Developing Unique Partnerships** • Matt Jones, TPG Partner, Co-Managing Partner TPG Secondaries • Moderator: Greg Vaughan, Morgan Stanley Private Wealth Management • *Intro: Matt Sekera, Managing Director, TPG*	
4:15pm – 4:30pm	**Small Room Big Deal - The Art and Science of Boardroom Presenting** • Jeannie Underwood-Kotner, Senior Vice President, Head of Global Atlantic Consulting	
4:30pm – 4:40pm	**REFRESHMENT BREAK**	**EXHIBIT HALL**
4:40pm – 4:50pm	**SHOOK Ones: My Best Idea** • Stacey Barrins, Morgan Stanley Wealth Management • Moderator: Vince Lumia, Head of Wealth Management Client Segments, Morgan Stanley • *Intro: Troy Gayeski, Chief Market Strategist, Future Standard*	**CRISTAL BALLROOM**
4:50pm – 5:05pm	**GenAI: The Next Great Step Change** • Beijia Ma, Head of Equity Strategy, Alkeon Capital Management	
5:05pm – 5:10pm	**SHOOK Ones: My Best Idea** • Kerry Karangelen, Morgan Stanley Private Wealth Management	
5:10pm – 5:25pm	**Market Outlook: A Market in Suspense** • Michael Arone, Chief Investment Strategist, State Street Investment Management • Moderator: Richard Jones, Merrill Private Wealth Management • *Intro: Darius Tandy, Regional Consultant, State Street Investment Management*	
5:25pm – 5:40pm	**Growth Engines: Navigating Private Equity in the Small to Mid-Cap Space** • Ashmi Mehrotra, Managing Director, Portfolio Manager, Global Co-Head of the Private Equity, J.P. Morgan Asset Management • Moderator: Elizabeth Weikes, J.P. Morgan Wealth Management • *Intro: Patrick Frame, MD, Northern Divisional Sales Manager, Wealth Management Channel, J.P. Morgan Asset Management*	
5:40pm – 5:55pm	**Scaling With Intention: Practical Ways to Grow Without Sacrificing Client Experience** • Corey Mazza, UBS Private Wealth Management • Lisa Detanna, Raymond James & Associates • Moderator: Tash Elwyn, President, Private Client Group, Raymond James	
5:55pm – 6:00pm	**Let's Get to Cocktails!** • Frank Berland, Managing Partner, SHOOK Research	
6:00pm – 7:00pm	**COCKTAIL RECEPTION**	**EXHIBIT HALL & CRISTAL TERRACE**
7:00pm	**DINE-AROUNDS WITH PARTNERS**	
	FRIDAY, OCTOBER 17, 2025	
7:30am – 8:30am	**BREAKFAST**	**EXHIBIT HALL**
8:30am – 8:35am	**Coffee with Lizzy!** • Liz Shook, Co-Founder & COO, SHOOK Research	**CRISTAL BALLROOM**
8:35am – 8:50am	**Building High-Performing Team Structures** • Troy Nelson, Nelson Wealth Management, Edward Jones • Moderator: David Chubak, Head of Wealth Management & Field Management, Edward Jones	
8:50am – 9:05am	**Building a World-Class Team** • Seth Haye, Morgan Stanley Wealth Management • Chris Cooke, Cooke Financial Group	
9:05am – 9:25am	**Designing Your Practice of the Future: Succession Planning with Purpose** • Daniel Ruediger, Ameriprise Financial Services • Raj Bhatia, Merrill Private Wealth Management • Moderator: Athena McGuire, Franchise Field Vice President, Ameriprise • *Intro: Blake Pastore, Senior Associate VP | Advisor Services, SHOOK Research*	

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9:25am – 9:45am	**Designing the Next Chapter: Growth, Focus, and the Future of Your Business** • Joan Valenti, Valenti Wealth Management, LPL Financial • David Karp, Cresset • Moderator: Peter Vincent, EVP, Head of Advisor Client Success and Field Management, LPL Financial • *Intro: Madison Rizzo, Associate VP | Partnerships, SHOOK Research*	
9:45am – 10:05 am	**State of Cybersecurity** • David McSweeney, Vice President, Client Assurance, Information Security Office, Fidelity • *Intro: George Irvin, Vice President, Sales, Fidelity*	
10:05am – 10:20am	**SNACK BREAK**	**EXHIBIT HALL**
10:20am – 10:35am	**The Beginners Blueprint for Investing in Space & Defense Tech** • Blair Bigelow May, Founder, Commercial Spaceflight Strategy • Moderator: Tim Maul, Director of Investor Relations, Balerion Space Ventures	**CRISTAL BALLROOM**
10:35am – 10:50am	**Team Structure & Compensation**	
10:50am – 10:55am	**SHOOK Ones: My Best Idea**	
10:55am – 11:00am	**The Last Word** • R.J. Shook, Co-Founder & President, SHOOK Research, Senior Forbes Contributor • Liz Shook, Co-Founder & COO, SHOOK Research	