

Forbes | SHOOK

ON-THE-ROAD



Hotel Crescent Court | Dallas, TX
October 25, 2023

12:00-12:30pm	Lunch + Networking
12:30-12:45pm	We're Here on Purpose <ul style="list-style-type: none">• R.J. Shook, Co-Founder & President, SHOOK Research, Senior Forbes Contributor
12:45-12:50pm	Welcome <ul style="list-style-type: none">• Bobby Miller, Advisor Consultant, New York Life Investments
12:50-12:55pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Raj Kalyandurg, Merrill Private Wealth Management
12:55-1:30pm	Outlook for Muni's <ul style="list-style-type: none">• Michael Denlinger, Managing Director, Portfolio Manager/Trader, MacKay Shields
1:30-1:50pm	Grow Your Practice by Inspiring Women Clients to Take Control <ul style="list-style-type: none">• Jennifer Tarsney, Managing Director, Advisor Advancement Institute, New York Life Investments
1:50-2:00pm	Networking + Snack Break
2:00-2:05pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• H. Keith Wallace, Merrill Private Wealth Management
2:05-2:25pm	Opportunities in the SMID Space <ul style="list-style-type: none">• David Cook, Vice President and Portfolio Manager, Fiera Capital
2:25-2:45pm	Global Infrastructure Outlook <ul style="list-style-type: none">• David Leggette, Lead Product Strategist & Head of Marketing, Global Market & Client Service, CBRE Investment Management
2:45-2:50pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• James Hafele, Stifel
2:50-3:30pm	Dr. Kevin Elko: The Psychology of Growth <ul style="list-style-type: none">• Dr. Kevin Elko, Advisor Advancement Institute, New York Life Investments
3:30-3:35pm	Closing Comments <ul style="list-style-type: none">• Bobby Miller, Regional Advisor Consultant, New York Life Investments