

# Forbes | SHOOK ON-THE-ROAD

Ritz Carlton, Cleveland



BLUE OWL

Wednesday,  
September 6, 2023

## CE Credits Available

3 CFP credits  
3.5 IMCA credits

### TIME

### SESSION & SPEAKER

12:00-12:30pm

**Registration, Lunch + Networking**

12:30-12:40pm

**We're Here on Purpose**

- **R.J. Shook**, Co-Founder & President, SHOOK Research, Senior Forbes Contributor

12:40-1:00pm

**Alternative Markets Overview**

- **Madeleine Sinclair**, Head of Private Wealth North American Distribution, Blue Owl Capital

1:00-1:30pm

**Trends in Private Equity: GP Stakes & Secondaries**

- **Michael Conley**, Managing Director, GP Strategic Capital Investment Team, Blue Owl Capital

1:30-2:00pm

**Navigating the Private Credit Craze & the Opportunities in Direct Lending**

- **Jeremy Lee**, Private Wealth Portfolio Strategist – Credit, Blue Owl Capital

2:00-2:20pm

**Advisor Conversations with Clients: Allocating to Direct Lending**

- **Kyle Adams**, Stifel

- Moderator: **David Sirianni**, Vice President, Strategic Partnerships, Blue Owl

2:20-2:30pm

**Networking + Snack Break**

2:30-2:35pm

**SHOOK Ones – My Best Idea**

- **Owen McBride**, UBS Wealth Management

2:35-3:00pm

**Playing the Real Estate Market & the Benefits of a New Lease Strategy**

- **Gary Rozier**, Managing Director, Real Estate Investment Team, Blue Owl Capital

3:00-3:20pm

**Advisor Conversations with Clients: Allocating to Real Estate**

- **Michael Rosloniec**, Graystone Consulting from Morgan Stanley

- Moderator: **Nicole Klotz**, Regional Market Leader, Blue Owl Capital

3:20-3:25pm

**SHOOK Ones – My Best Idea**

- **Katie Solvesky**, Merrill Lynch Wealth Management

3:25-3:45pm

**Bringing it Together: Opportunities in Private Markets with Blue Owl**

- **Nicole Klotz**, Regional Market Leader, Blue Owl

4:00-6:00pm

**Cocktail Reception**