

## Forbes | SHOOK Virtual Top Advisor Event Forging Ahead

Thursday,  
June 3, 2021

TIME	SESSION & SPEAKER
11:00-11:10 am	<b>Opening Remarks</b> — <b>RJ Shook</b> , President & Co-Founder, SHOOK Research & Senior Forbes Contributor — <b>Liz Shook</b> , COO & Co-Founder, SHOOK Research — <b>Frank Berland</b> , Managing Partner, SHOOK Research
11:10-11:25 am	<b>Winning Team Structures</b> — <b>Nestor Vicknair</b> , Merrill Lynch Wealth Management — <b>Erin Scannell</b> , Ameriprise Financial Services — <b>Jennifer Shydler</b> , Merrill Lynch Wealth Management — Moderator: <b>Heather Crist</b> , Head of Field Engagement, UBS Wealth Management USA
11:25-11:40 am	<b>The World is Changing. Your portfolio needs to change too. (Maybe a lot.)</b> — <b>Richard Bernstein</b> , CEO & CIO, Richard Bernstein Advisors
11:40-11:55 am	<b>Creating Lasting Value: A guide to building a successful HNW enterprise</b> — <b>Michael Schweitzer</b> , Head of HNW, Capital Group   American Funds
11:55am-12:10 pm	<b>Addressing The Diversity Imperative: The Opportunity Ahead</b> — <b>Andy Sieg</b> , President, Merrill Lynch Wealth Management — Moderator: <b>Rebecca Rothstein</b> , Merrill Private Wealth Management
12:10-12:30 pm	<b>Real Estate as an Investment: A conversation with A.J. Agarwal, Blackstone</b> — <b>A.J. Agarwal</b> , Sr. Managing Director, Blackstone — Moderator: <b>Matt Sheehan</b> , Morgan Stanley Private Wealth Management
12:30-12:45 pm	<b>3 Habits of Highly Effective Financial Professionals</b> — <b>David Curry</b> , National Sales Manager, Lincoln Financial Distributors — Introduction: <b>Justin DiLucchio</b> , AVP, Relationship Management, Lincoln Financial Distributors
12:45-1:00 pm	<b>A Vision for Victory</b> — <b>Terry Cook</b> , Parcion Private Wealth — <b>Dr. Kevin Elko</b> , Advisor Advancement Institute, NY Life Investments — Introduction: <b>Jen Tarsney</b> , Director, Practice Management, NY Life Investments
1:00-1:15 pm	<b>Value Investing and Technology</b> — <b>Manish Gupta</b> , Portfolio Manager & Senior Research Analyst, First Eagle
1:15-1:30 pm	<b>Investing in the Digital Asset and Blockchain Ecosystem</b> — <b>Mike Novogratz</b> , Founder & CEO, Galaxy Digital — <b>Alli McCartney</b> , UBS Private Wealth Management
1:30-1:45 pm	<b>Achieving Philanthropic Goals Through Selling a Major Business Asset</b> — <b>Josh Stamer</b> , Senior Managing Director, Foundation Source — <b>Lisa Snyder</b> , UBS Wealth Management
1:45-2:00 pm	<b>Talking Taxes with Your Clients: What the Biden Administration's Proposals Could Mean</b> — <b>Michael Amoia</b> , Senior Vice President, Advanced Sales, Crump Life Insurance Services — Moderator: <b>Ali Phillips</b> , Obermeyer Wood Investment Counsel
2:00-2:10 pm	<b>Cutting through Complexity to Build your Bottom Line</b> — <b>Paul Brunswick</b> , Head of Invesco Global Consulting, Invesco

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**The Competitive Advantage of Diverse Teams**

- [Kimberley Hatchett](#), Morgan Stanley Private Wealth Management
- [Jonathan Hodge](#), UBS Wealth Management
- Moderator: [Jonathan Hodge](#), Sandra Richards, Head of Global Sports, Entertainment & Segment Sales, Morgan Stanley

2:25-2:40 pm

**Current Opportunities For A Dedicated China Position**

- [Brendan Ahern](#), Chief Investment Officer, KraneShares

2:40-2:55 pm

**Growing Your Practice in Any Environment**

- [Mark Douglass](#), Morgan Stanley Private Wealth Management
- [Robert Sackler](#), Wells Fargo Advisors
- Moderator: [Don Plaus](#), Managing Director, Head of PWM, International & Institutional, Merrill Lynch Wealth Management

2:55-3:10 pm

**The Long-Term Opportunity in Financials – *Misunderstood, Mispriced, and Primed for Revaluation***

- [Chris Davis](#), Chairman & Portfolio Manager, Davis Advisors

3:10-3:30 pm

**Senior Loans: Solving for Yield and Rising Interest Rates**

- [Taylor Watts](#), Senior Client Portfolio Manager, Invesco

3:30-3:45 pm

**America's #1 Advisor: Building the Team of the Future**

- [Jeff Erdmann](#), Merrill Private Wealth Management
- Moderator: [Joe Stein](#), Regional Director, Alger

3:45-4:00 pm

**The Impact Advisor, Clients for Life**

- [John Mathews](#), Group MD, Head of PWM & UHNW Americas, UBS Wealth Management
- [Judy Fredrickson](#), UBS Private Wealth Management

4:00-4:15 pm

**Conversation with Anthony Scaramucci**

- [Anthony Scaramucci](#), Founder & Managing Partner, SkyBridge Capital
- Moderator: [David Bahnsen](#), The Bahnsen Group

4:15-4:25 pm

**St. Jude and the Power of Purpose: Connect Clients to the Greater Good**

- [Rick Shadyac Jr.](#), President & CEO of ALSAC, the fundraising and awareness organization for St. Jude Children's Research Hospital

4:25-4:30 pm

**Closing Remarks**

- [Liz Shook](#), COO & Co-Founder, SHOOK Research