

Forbes | SHOOK ON THE ROAD

Four Seasons Hotel Miami

#ForbesSHOOK

Thursday, September 5, 2024

TIME	SESSION & SPEAKER
1:00 – 1:10pm	Leading With Purpose <ul style="list-style-type: none">• R.J. Shook, Co-Founder & President, SHOOK Research & Senior Forbes Contributor
1:10 – 1:25pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Andrew Kahner, UBS Wealth Management• Moderator: Jake Lesser, Senior Alternative Investment Specialist, T. Rowe Price• <i>Intro: James Mugno, Regional Investment Consultant, T. Rowe Price</i>
1:25 – 1:50pm	Unlocking Opportunities and Challenges in Private Credit & Real Estate <ul style="list-style-type: none">• Bert Crouch, Head of North America, Invesco Real Estate• Andrew Winer, Managing Director, Chief Operating Officer, Oak Hill Advisors• Moderator: Austin Cook, Morgan Stanley Wealth Management• <i>Intro: Erica Horak, Senior Analyst, SHOOK Research</i>
1:50 – 2:10pm	2024 Midyear ETF Market Outlook: Resilience Under Pressure <ul style="list-style-type: none">• Mike Arone, Chief Investment Strategist, State Street Global Advisors SPDR• Moderator: Brett Langbert, Wells Fargo Advisors• <i>Intro: Pat Renehan, Vice President, Regional Consultant, State Street Global Advisors SPDR</i>
2:10 – 2:15pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Michael Beckerman, Merrill Private Wealth Management• <i>Intro: Greg Feldman, Senior Investment Consultant, Thornburg</i>
2:15 – 2:35pm	Investing Away from the Herd – There Is Still Value in Value Investing <ul style="list-style-type: none">• Keith Howell Jr., Portfolio Manager, Newton Investment Management Group• Moderator: Cynthia Chamberlayne, Senior Investment Consultant, BNY Mellon Investment Management• <i>Intro: Mike Hurley, Senior Investment Consultant, BNY Mellon Investment Management</i>
2:35 – 2:55pm	Deploying Capital Today <ul style="list-style-type: none">• Viral Patel, Senior Managing Director, Blackstone Private Equity Strategies• Moderator: Jeff Pietrzak, Morgan Stanley Wealth Management• <i>Intro: Mike Cambias, Managing Director, Blackstone Private Wealth Solutions</i>
2:55 – 3:10pm	Networking Break
3:10 – 3:30pm	Opportunities and Risks in Municipal Bonds <ul style="list-style-type: none">• Johnathan N. Wilhelm, Senior Vice President, Senior Portfolio Manager, First Trust
3:30 – 3:50pm	Investing for a New Paradigm: The Rise of the Automation Age <ul style="list-style-type: none">• Scott Helfstein, Head of Investment Strategy, Global X ETFs• Moderator: Scott Barkow, Raymond James & Associates• <i>Intro: Peter Quelch, Regional Director, Global X ETFs</i>
3:50 – 3:55pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Mijanou Spurdle, Morgan Stanley Wealth Management• <i>Intro: Ann Hall, Analyst, SHOOK Research</i>

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3:55 – 4:15pm

Building Portfolios for Resilience and Tax Efficiency with Net Lease Real Estate

- **Gary Lin**, Head of Global Portfolio Strategy and Solutions, Blue Owl
- Moderator: **Michael Brener**, Merrill Wealth Management
- *Intro: **Evan Fernandez**, Regional Market Leader, Blue Owl*

4:15 – 4:35pm

Hiring, Retaining & Sourcing New Talent

- **Meryll Bangsil**, UBS Wealth Management
- **Andrew Schultz**, Morgan Stanley Private Wealth Management
- Moderator: **Derek Witte**, Market Leader, Invesco Consulting Group
- *Intro: **Sabrina Lall**, Market Consultant, Invesco*

4:35 – 4:45pm

The Last Word

- **Frank Berland**, Managing Partner, SHOOK Research

4:45 – 5:45pm

Cocktail Reception

5:45pm

Dine-Arounds with Partners