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Boston Marriott Long Wharf

#ForbesSHOOK

Tuesday, November 19, 2024

TIME	SESSION & SPEAKER
	CE Credits: 3 CFP & 3.5 IW / IMCA
12:00 – 12:10pm	**Building the Infinite Team** • **R.J. Shook,** Co-Founder & President, SHOOK Research & Senior Forbes Contributor
12:10 – 12:15pm	**SHOOK Ones: My Best Idea** • **Ari Weber,** Merrill Wealth Management • *Intro: **Callie Askins**, Senior Associate VP / Project Leader, SHOOK Research*
12:15 – 12:35pm	**Evolving Opportunities in Private Credit** • **Fritz Thomas,** Head of Client Coverage & Partner, Oak Hill Advisors • Moderator: **Adam Pennacchio,** Executive Director, Senior Regional Alternatives Investments Director, Morgan Stanley • *Intro: **Russ Martin,** Regional Investment Consultant, T. Rowe Price*
12:35 – 12:55pm	**Unlocking Opportunities and Challenges in Real Estate** • **James Brunger,** Private Markets Specialist, Invesco • Moderator: **Daniel Lewin,** UBS Private Wealth Management • *Intro: **Jeff Murphy,** Market Leader, Invesco*
12:55 – 1:15pm	**A New Cycle for Private Markets** • **Viral Patel,** Chief Executive Officer, Blackstone Private Equity Strategies • **Greg Blank,** Senior Managing Director & Chief Executive Officer, BXINFRA • Moderator: **John Cronin,** Managing Director, Blackstone Private Wealth Solutions • *Intro: **Corrinne Lang,** Vice President, Blackstone Private Wealth Solutions*
1:15 – 1:35pm	**SHOOK Ones: My Best Idea** • **Raj Sharma,** Merrill Private Wealth Management • Moderator: **Jeff Murphy,** Market Leader, Invesco • *Intro: **Lindsey Nacht,** Vice President / Director of Operations, SHOOK Research*
1:35 – 1:55pm	**Investing for a New Paradigm: The Rise of the Automation Age** • **Scott Helfstein,** Head of Investment Strategy, Global X ETFs • Moderator: **Brian Doyle,** Wells Fargo Advisors • *Intro: **Connor Hawkinson,** Regional Director, New England, Global X ETFs*
1:55 – 2:10pm	**Networking Break**
2:10 – 2:30pm	**U.S. Small Caps: Is This a (Lasting) Regime Change?** • **Jonathan Coleman,** Portfolio Manager, Janus Henderson Investors • *Intro: **Brian Arcara,** Director, Advisor Solutions Group, Janus Henderson Investors*
2:30 – 2:50pm	**ETF Market Outlook 2025: What Happens After the Soft Landing** • **Michael Arone,** Chief Investment Strategist, State Street Global Advisors • Moderator: **Peter Princi,** Graystone Consulting from Morgan Stanley • *Intro: **James Libutti,** Regional Consultant, State Street Global Advisors*
2:50 – 3:10pm	**Making Sense of the Abnormal and Revisiting the Math** • **Paul McGinn,** Client Portfolio Manager, Fixed-Income Strategy, First Trust

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3:10 – 3:30pm **Opportunities in Real Estate: Tax Advantaged Income in Triple Net Lease**

- **Meghan Donoghue,** Principal, Real Estate Portfolio Strategist, Blue Owl Capital
- Moderator: **Josh Cotter,** Merrill Wealth Management
- *Intro: **Chad Colombo,** Principal and Regional Market Leader, PWM Northeast, Blue Owl*

3:30 – 3:50pm **Team Structure and Compensation**

- **Mary Mullin,** Merrill Wealth Management
- **Ira Rapaport,** New England Private Wealth Advisors
- Moderator: **Timothy Brock,** Senior Regional Consultant, New England, State Street Global Advisors

3:50 – 4:00pm **The Last Word**

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

4:00 – 5:00pm **Cocktail Reception**