

# Forbes | SHOOK ALTERNATIVES SUMMIT

November 7, 2024 | Convene, NYC

TIME	SESSION & SPEAKER
11:00-11:30am	<b>CE Credits: 4 I-W / CIMA, 3.5 CFP</b>
11:30-11:35am	<b>REGISTRATION</b>
	<b>Welcome Remarks</b> <ul style="list-style-type: none"><li>• <b>Frank Berland</b>, Managing Partner, SHOOK Research</li></ul>
11:35-11:45am	<b>SHOOK Ones: Our Best Idea</b> <ul style="list-style-type: none"><li>• <b>Gerry Klingman</b>, Klingman &amp; Associates</li><li>• <b>Tom Klingman</b>, Klingman &amp; Associates</li><li>• Moderator: <b>Jonathan Ross</b>, VP, Market Leader &amp; Senior Advisor Consultant, NY Metro, Invesco</li><li>• <i>Introduction: <b>Blake Pastore</b>, Senior Associate VP   Advisor Services, SHOOK Research</i></li></ul>
11:45am-12:05pm	<b>The Golden Age of Private Credit &amp; What the Future Holds</b> <ul style="list-style-type: none"><li>• <b>Jim Zelter</b>, Co-President, Apollo Asset Management</li><li>• Moderator: <b>Jerry Pascucci</b>, Co-Head of Alternative Investment Solutions, UBS Global Wealth Management</li><li>• <i>Introduction: <b>Howard Nifoussi</b>, Partner, Apollo Global Management</i></li></ul>
12:05-12:25pm	<b>Private Equity: Investing Through Today's Evolving Landscape</b> <ul style="list-style-type: none"><li>• <b>Christopher James</b>, Chairperson, Blackstone Private Equity Strategies</li><li>• Moderator: <b>Michael Poppo</b>, UBS Wealth Management</li><li>• <i>Introduction: <b>Jeanette Pieper</b>, Managing Director, Blackstone Private Wealth Solutions</i></li></ul>
12:25-12:45pm	<b>Top Advisors – How We Are Allocating in Alts</b> <ul style="list-style-type: none"><li>• <b>Shawn Rubin</b>, Morgan Stanley Private Wealth Management</li><li>• <b>Monty Cerf</b>, UBS Private Wealth Management</li><li>• Moderator: <b>Chris Norris</b>, Senior Alternatives Investment Specialist, T. Rowe Price</li></ul>
12:45-12:50pm	<b>SHOOK Ones: My Best Idea</b> <ul style="list-style-type: none"><li>• <b>Heather Goodbody</b>, Merrill Private Wealth Management</li><li>• <i>Introduction: <b>Dylan Ferrante</b>, Senior Marketing Analyst, SHOOK Research</i></li></ul>
12:45-1:10pm	<b>Special Sits Investing in Today's Market</b> <ul style="list-style-type: none"><li>• <b>Julian Salisbury</b>, Partner &amp; Co-CIO, Sixth Street</li><li>• Moderator: <b>James Beale</b>, National Business Development Director, Managing Director, Rockefeller Global Family Office</li></ul>
1:10-1:30pm	<b>Navigating Private Credit's Evolution</b> <ul style="list-style-type: none"><li>• <b>Bill Bohnsack</b>, President &amp; Senior Partner, OHA</li><li>• Moderator: <b>Peter Prunty</b>, Senior Regional Director for Alternative Investments, Morgan Stanley</li><li>• <i>Introduction: <b>Chris Norris</b>, Senior Alternative Investment Specialist, T.Rowe Price</i></li></ul>
1:30-2:30pm	<b>NETWORKING LUNCH</b>
2:30-2:50pm	<b>Driving Value: An Operations-Oriented Approach to Private Equity</b> <ul style="list-style-type: none"><li>• <b>David Nowak</b>, Managing Partner, Private Equity, Brookfield's Private Equity Group</li><li>• Moderator: <b>Christopher Toomey</b>, Morgan Stanley Private Wealth Management</li><li>• <i>Introduction: <b>Allison Williams</b>, Senior Vice President, Northeast Region, Brookfield Oaktree Wealth Solutions</i></li></ul>

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2:50-3:10pm

## Diversifying Portfolios for Any Environment with All-Weather Income

- **Jay Wyckoff**, Managing Director & National Sales Manager, Blue Owl Capital
- Moderator: **Adam Epstein**, UBS Private Wealth Management
- Introduction: **Rob Demert**, Principal, Regional Market Leader, Blue Owl Capital

3:10-3:15pm

## SHOOK Ones: My Best Idea

- **Scott Wilson**, Morgan Stanley Private Wealth Management
- Introduction: **Laurie L. Chan**, U.S. Head of Alternative Solutions, PGIM Investment

3:15-3:35pm

## Navigating the Competitive Private Credit Landscape

- **David Santoriello**, Managing Director, Deputy Head of Private Wealth Americas, Golub Capital
- **Dianna Carr-Coletta**, Managing Director & Partner, Direct Lending, PGIM Private Capital
- Moderator: **Jeffrey Corliss**, RDM Financial Group

3:35-3:40pm

## SHOOK Ones: My Best Idea

- **Charles Balducci**, Merrill Wealth Management

3:40-4:00pm

## Not All Credit is Created Equal

- **Bert Crouch**, Managing Director & Portfolio Manager, Invesco Real Estate
- Moderator: **Andrew Billinghamurst**, Merrill Wealth Management
- Introduction: **James Barker**, Market Leader, Invesco

4:00pm

## The Last Word

- **Lindsey Nacht**, Vice President | Director of Operations, SHOOK Research

4:00-5:00pm

## Cocktail Reception Hosted by T.Rowe Price