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ON THE ROAD

J.W. Marriott Chicago

#ForbesSHOOK

Tuesday, December 3, 2024

TIME	SESSION & SPEAKER
	CE Credits: 3 CFP & 3.5 IW / IMCA
12:00 – 12:10pm	**The Infinite Team** • **R.J. Shook,** Co-Founder & President, SHOOK Research & Senior Forbes Contributor
12:10 – 12:15pm	**SHOOK Ones: My Best Idea** • **Jonathan Peters,** Morgan Stanley Wealth Management • *Intro: **Erick Lopez,** Associate VP | Research, SHOOK Research*
12:15 – 12:35pm	**Navigating Private Credit's Evolution and What Lies Ahead** • **Andrew Winer,** Managing Director, Chief Operating Officer – Registered Funds, Oak Hill Advisors • Moderator: **Vipul Shah,** Morgan Stanley Wealth Management • *Intro: **Peter Moor,** Vice President, Regional Investment Consultant, T. Rowe Price*
12:35 – 12:55pm	**Opportunities in Real Estate: Generating Long-term Contractual Income with Triple Net Lease** • **Marc Zahr,** Co-President & Head of Real Estate, Blue Owl • Moderator: **David Heide,** RBC Wealth Management • *Intro: **Justin Knowles,** Vice President and Regional Market Leader, Blue Owl Capital*
12:55 – 1:15pm	**U.S. Small Caps: Is This a (Lasting) Regime Change?** • **Aaron Schaechterle,** Portfolio Manager | Research Analyst, Janus Henderson Investors • *Intro: **Jonathan Root,** Director, Advisor Solutions Group, Janus Henderson Investors*
1:15 – 1:20pm	**SHOOK Ones: My Best Idea** • **Christina Collins,** Northwestern Mutual • *Intro: **Jordan Merrill,** Associate VP | Research Manager, SHOOK Research*
1:20 – 1:40pm	**Enhancing Income Portfolios with Private Markets** • **Max Swango,** Head of Global Client Portfolio Management, Invesco • **Scott Kroll,** Morgan Stanley Private Wealth Management • Moderator: **Cory Osekowski,** Vice President, Senior Advisor Consultant, Invesco
1:40 – 1:55pm	**Networking Break**
1:55 – 2:15pm	**Private Credit: The Opportunity Today and What Lies Ahead** • **David Gaito,** Head of Direct Lending, Fidelity Investments • Moderator: **Brian Kasal,** FourStar Wealth Advisors • *Intro: **Julie Richards,** Regional Director, Fidelity Investments*
2:15 – 2:20pm	**SHOOK Ones: My Best Idea** • **Nicholas LoMaglio,** UBS Wealth Management • *Intro: **Luke Bartow,** Associate VP / Event Programming, SHOOK Research*
2:20 – 2:40pm	**ETF Market Outlook 2025: What Happens After the Soft Landing** • **Michael Arone,** Chief Investment Strategist, State Street Global Advisors • Moderator: **Thomas Ryan,** Hedeker Wealth • *Intro: **Troy Page,** Regional Consultant, State Street Global Advisors*
2:40 – 3:00pm	**A New Cycle for Private Markets** • **Viral Patel,** Chief Executive Officer, Blackstone Private Equity Strategies • **Kurt Summers,** Senior Managing Director & Head of Public-Private Partnerships, Blackstone Infrastructure Group • Moderator: **Debbie Michaelson,** Principal, Blackstone Private Wealth Solutions • *Intro: **Cody Keane,** Vice President, Blackstone Private Wealth Solutions*

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3:00 – 3:20pm **Investing for a New Paradigm: The Rise of the Automation Age**
- **Scott Helfstein,** Head of Investment Strategy, Global X ETFs
- Moderator: **Eric Hayes,** Morgan Stanley Wealth Management
- *Intro: **Kize Behrends,** Regional Consultant, Global X ETFs*

3:20 – 3:40pm **Election Implications and the Economic Outlook**
- **Andrew Opdyke,** Senior Economist, First Trust

3:40 – 4:00pm **Building the Team of the Future**
- **Lindsey Clark,** Merrill Wealth Management
- **Joseph Silich,** Morgan Stanley Wealth Management
- Moderator: **Kristin Buikema**, Senior Alternative Investment Specialist, T. Rowe Price

4:00 – 4:05pm **The Last Word**
- **Frank Berland,** Managing Partner, SHOOK Research

4:05 – 5:05pm **Cocktail Reception**