

Forbes | SHOOK
TOP WOMEN ADVISOR SUMMIT
MAY 20 – 22, 2024 | MANALAPAN, FL
CE CREDITS AVAILABLE
CFP: 7, I-W: 9.5

MONDAY, MAY 20, 2024

TIME	SESSION & SPEAKER	LOCATION
3:30 – 6:00pm	Registration	REGISTRATION HALL
5:00 – 6:00pm	Welcome Reception	
6:15 – 7:40pm	Gala Dinner	OCEAN BALLROOM & FLAGLER HALL
6:45 – 6:55pm	Welcome to Our Very Special Event <ul style="list-style-type: none"> • Liz Shook, Co-Founder & COO, SHOOK Research 	
6:55 – 7:10pm	The Final Tear <ul style="list-style-type: none"> • R.J. Shook, Co-Founder & President, SHOOK Research, Senior Forbes Contributor 	GRAND BALLROOM
7:10 – 7:40pm	The Impact of Policy and Politics in a Presidential Election Year <ul style="list-style-type: none"> • Libby Cantrill, Head of Public Policy, PIMCO • Moderator: Jennifer Povlitz, UBS Division Director U.S. Wealth Management • <i>Intro: Rachael Razzano, Vice President, Account Manager, PIMCO</i> 	

TUESDAY, MAY 21, 2024

TIME	SESSION & SPEAKER	LOCATION
6:00 – 6:45am	Morning Beachside Yoga hosted by Canyon Ranch *SIGN UP AT REGISTRATION*	COURTYARD LAWN
7:00am – 3:00pm	Registration	REGISTRATION HALL
7:00 – 8:00am	Breakfast	
8:00 – 8:05am	Coffee with Lizzy <ul style="list-style-type: none"> • Liz Shook, Co-Founder & COO, SHOOK Research 	
8:05 – 8:15am	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Anna Winderbaum, Morgan Stanley Private Wealth Management • Moderator: Caroline Gundeck, Managing Director & Head of PWM Field and Client Engagement, Morgan Stanley Wealth Management • <i>Intro: Jeremy Shook, Sophomore, Emory University</i> 	FLAGLER HALL
8:15 – 8:35am	Deepening Relationships with Clients <ul style="list-style-type: none"> • Cheryl Young, Rockefeller Global Family Office • Shannon Spotswood, RFG Advisory • Moderator: Maria Quinn, Senior Advice Strategist, Vanguard • <i>Intro: Amy Elizabeth Brothers, Senior Sales Executive, Vanguard</i> 	
8:35 – 8:40am	Celebrating Women Breaking the Glass Ceiling <ul style="list-style-type: none"> • Allison Bonds Mazza, Head of Intermediary, State Street Global Advisors 	
8:40 – 9:00am	Century of Biotech: Capitalizing on the Biomedical Revolution <ul style="list-style-type: none"> • Agustin Mohedas, Ph.D., Portfolio Manager Research Analyst, Janus Henderson Investors • <i>Intro: Diane Snowden, Head of the Advisor Solutions Group, Janus Henderson Investors</i> 	GRAND BALLROOM
9:00 – 9:20am	Standing Strong	
9:20 – 9:35am	Snack Break	
9:35 – 9:55am	Private Equity: Investing Through Today's Evolving Landscape <ul style="list-style-type: none"> • Ann Chung, Senior Managing Director & Global Head of Consumer, Blackstone Growth • Anushka Sunder, Senior Managing Director & Head of Healthcare Private Equity North America, Blackstone • Moderator: Jeanette Pieper, Managing Director, Blackstone Private Wealth Solutions • <i>Intro: Debbie Michaelson, Principal, Blackstone Private Wealth Solutions</i> 	

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9:55 – 10:00am	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Mary Mullin, Merrill Wealth Management • <i>Intro: Lindsey Nacht, Vice President Director of Operations, SHOOK Research</i> 	
10:00 – 10:20am	Become Priceless to your Clients <ul style="list-style-type: none"> • Lisa Kueng, Managing Director of Business Development, Invesco Global Consulting • <i>Intro: Allison Sadd, Senior Advisor Consultant, Invesco</i> 	
10:20 – 10:40am	Not Your Typical Economic Cycle <ul style="list-style-type: none"> • Emily Roland, Co-Chief Investment Strategist, John Hancock Investment Management • Moderator: Sarah Ponczek, UBS Private Wealth Management • <i>Intro: Kristie Feinberg, President & CEO of John Hancock Investment Management</i> 	
10:40 – 10:55am	Cracking the Code: Expanding Women Advisor Representation in Wealth Management <ul style="list-style-type: none"> • Lindsey Clark, Financial Solutions Advisor, Merrill Wealth Management • Melaina Cano, Senior Financial Advisor, Merrill Wealth Management • Moderator: Lindsay Hans, President & Co-Head, Merrill Wealth Management • <i>Intro: Jamie Shook, Senior, Wake Forest University</i> 	
10:55 – 11:15am	The Blueprint to Wealth: A Discussion on Financial Planning <ul style="list-style-type: none"> • Emily Rubin, UBS Private Wealth Management • Kathleen Entwistle, Morgan Stanley Private Wealth Management • Moderator: Anthea Tjuanakis Cox, Managing Director & Head of Financial Planning, Morgan Stanley Wealth Management • <i>Intro: Blake Pastore, Senior Associate VP, Advisor Services, SHOOK Research</i> 	
11:15 – 11:30am	Refreshment Break	FLAGLER HALL
11:30am – 12:30pm	Roundtables	
12:30pm	Lunch	GRAND BALLROOM
12:35 – 12:40pm	Forbes SHOOK Directory Exclusive Offer	
12:40 - 12:45pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Missy Spickler, Merrill Wealth Management • <i>Intro: LoriAnn LaSalle, Vice President Business Manager, SHOOK Research</i> 	
12:50 – 1:10pm	The Art and Power of Authentic Communication <ul style="list-style-type: none"> • Sarano Kelley, Co-Founder, The Kelley Group • Moderator: Laurie Durante, Managing Director, Head of Platform Strategy & Senior Relationship Manager, FS Investments 	
1:10 – 1:30pm	Trends in Luxury Travel 2024 <ul style="list-style-type: none"> • Michael Solomon, Forbes Life Editor • Moderator: Michelle Mayer, Merrill Private Wealth Management 	
1:30 – 1:45pm	Innovation and the Next Technological Revolution <ul style="list-style-type: none"> • Dr. Ankur Crawford, Executive Vice President & Portfolio Manager, Alger • Moderator: Melissa Corrado Harrison, UBS Private Wealth Management • <i>Intro: Jessica Davis, Vice President & Regional Director, Alger</i> 	
1:45 – 2:00pm	Refreshment Break	FLAGLER HALL
2:00 – 2:25pm	What's Ahead for the Balance of 2024 <ul style="list-style-type: none"> • Mary Ann Bartels, Chief Investment Strategist, Sanctuary Wealth • Allison Boxer, Senior Vice President & Economist, PIMCO • Moderator: Susan Mazzetti, Quorum Private Wealth Sanctuary Wealth • <i>Intro: Missy Iandiorio Longo, Vice President, External Account Manager, PIMCO</i> 	GRAND BALLROOM
2:25 – 2:30pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Renee Hanson, Ameriprise Financial Services • <i>Intro: Luke Bartow, Associate VP Event Programming, SHOOK Research</i> 	
2:30 – 2:50pm	Unlocking Alternatives: Private Equity for Individuals	

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2:50 – 3:10pm	<ul style="list-style-type: none"> • Alisa Wood, Partner & Co-CEO, KKR Private Equity Conglomerate • Moderator: Julie Shechtman, Morgan Stanley Wealth Management • <i>Intro: Corry Hyer, Director, Global Client Solutions, KKR</i> Message Mapping: Getting to the Buying Zone <ul style="list-style-type: none"> • Jeannie Underwood-Kotner, Senior Vice President & Head of Global Atlantic Consulting, Global Atlantic Financial Group
3:10 – 3:30pm	Leading with Empathy and Purpose <ul style="list-style-type: none"> • Penny Pennington, Managing Partner, Edward Jones • Moderator: Jacob Morgan, Best-Selling Author & Professionally Trained Futurist
3:30 – 3:35pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Louise Armour, J.P. Morgan Wealth Management • <i>Intro: Iris Testler, Senior Associate VP Events, SHOOK Research</i>
3:35 – 3:50pm	Snack Break
3:50 – 4:10pm	Deal Making and State of the IPO Markets <ul style="list-style-type: none"> • Julie Hong, Senior Partner & Co-Head of TPG’s Global Capital Markets • Moderator: Debbie Shepherd, Central Division Executive, Field Leader, Merrill Wealth Management • <i>Intro: Prachi Makkar, Vice President, TPG</i>
4:10 – 4:20pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none"> • Jennifer Garcia, Wells Fargo Advisors • Moderator: Kirsten Pickens, Managing Director & Co-Head of U.S. Distribution, FS Investments • <i>Intro: Madison Rizzo, Senior Analyst, SHOOK Research</i>
4:20 – 4:40pm	Leading Your Way to Wellness <ul style="list-style-type: none"> • Kenly Brozman, Health & Performance Coach, Canyon Ranch • <i>Intro: Lisa Fisher, Director of Sales, Marketing & Communication, Canyon Ranch</i>
4:40 – 4:55pm	Going Against the Grain: How to Avoid Herd Mentality and Unlock Value <ul style="list-style-type: none"> • Samantha McLemore, Founder & CIO, Patient Capital Management • Moderator: Betsy Pakenas, Morgan Stanley Wealth Management • <i>Intro: Rebecca Kerner Reiss, Head of Business Development & Investor Relations, Patient Capital Management</i>
4:55 – 5:30pm	SHOOK® Showdown – Best Idea Competition presented by PGIM <ul style="list-style-type: none"> • Ken Correa, Managing Director, Head of Business & Client Development, Merrill Wealth Management • Heather Crist, Managing Director, Market Director & Head of Field Engagement, WM USA, UBS Group AG • Sinead Mitchell, V.P., Regional Sales Coordinator, SE FL Wires, PGIM Investments
5:30 – 5:35pm	Let’s Get Cocktails! <ul style="list-style-type: none"> • Frank Berland, Managing Partner, SHOOK Research
5:35 – 6:30pm	Cocktail Reception
6:30pm	Dine-Arounds with Partners

**FLAGLER HALL
GRAND BALLROOM**

COURTYARD LAWN

WEDNESDAY, MAY 22, 2024

TIME	SESSION & SPEAKER	LOCATION
8:00 – 9:00am	Breakfast	FLAGLER HALL
9:00 – 9:05am	Good Morning... More Coffee, Please! <ul style="list-style-type: none"> • Liz Shook, Co-Founder & COO, SHOOK Research 	GRAND BALLROOM
9:05 – 9:25am	Empowering Business Owner Conversations <ul style="list-style-type: none"> • Michelle Fuller, Head of U.S. Private Wealth Distribution, John Hancock Investment Management 	
9:25 – 9:45am	Investing in the New Space Economy <ul style="list-style-type: none"> • Jane Poynter, CEO & Co-Founder, Space Perspective • Moderator: Daniel Kleinmann, Partner, Balerion Space Ventures 	

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- 9:45 – 10:05am **Technological Convergence: Disrupting the Norm, Defining the Future**
- **Rebecca Burke**, Vice President & Product Specialist, ARK Investments
 - Moderator: **Tara Bueno**, Regional Vice President, Resolute Investment Managers
 - *Intro: Holly Anhut, Vice President, National Accounts, Resolute Investment Managers*
- 10:05 – 10:25am **Ideas for Succession Planning**
- **Nelrae Ali**, Array Private Investment Advisory Group | Wells Fargo Financial Network
 - **Carol Wilshire**, RBC Wealth Management
 - Moderator: **Alison Bonds Mazza**, Head of Intermediary, State Street Global Advisors
 - *Intro: Callie Askins, Senior Associate VP | Project Leader, SHOOK Research*
- 10:25 – 10:40am **Refreshment Break**
- 10:40 – 11:00am **Ladies First: How Opening the Door for Women Advisors Will Change the Industry**
- **Kyle Olson**, Merrill Wealth Management
 - **Tanya Mathews**, Meridian Wealth Management, LPL Financial
 - Moderator: **Alisa Maute**, EVP, Advisor Growth Solutions, LPL Financial
 - *Intro: Erick Lopez, Associate VP | Research, SHOOK Research*
- 11:00 – 11:20am **Great Wealth Transfer & Financial Equality**
- **Sallie Krawcheck**, CEO & Founder, Ellevest
 - Moderator: **Kim Jenson**, COO & Senior Vice President, Private Client Group, Raymond James Financial Services
 - *Intro: Kelly Baldoni, Head of Global Women's Strategies, Impax Asset Management*
- 11:20 – 11:25am **SHOOK Ones: My Best Idea**
- **Stacey Crittenden**, Merrill Wealth Management
 - *Intro: Kaili Moran, Office Coordinator, SHOOK Research*
- 11:25 – 11:30am **Keep in Touch, Ladies**
- **Liz Shook**, Co-Founder & COO, SHOOK Research

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