

Forbes | SHOOK ON THE ROAD

Hyatt Regency Boston

#ForbesSHOOK

Wednesday, April 23, 2025

TIME	SESSION & SPEAKER
12:00 – 12:10pm	Opening Remarks <ul style="list-style-type: none">• Frank Berland, Managing Partner, SHOOK Research
12:10 – 12:15pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Jonathan Price, Morgan Stanley Wealth Management• <i>Intro: Chris Norris, Senior Alternatives Investment Specialist, T. Rowe Price</i>
12:15 – 12:35pm	Finding Growth Opportunities Outside the Mag-7 <ul style="list-style-type: none">• Nick Schommer, Portfolio Manager, Janus Henderson Investors• Moderator: Ramzi Nuwayhid, Merrill Wealth Management• <i>Intro: Brian Arcara, Executive Director, Advisor Solutions Group, Janus Henderson Investors</i>
12:35 – 1:05pm	Sports Investment Opportunities <ul style="list-style-type: none">• Russell Wolff, Managing Director, Sports, Media & Entertainment, Sixth Street• Moderator: Ron Insana, Senior Analyst for CNBC• <i>Intro: Scott Reeder, Managing Director, Sixth Street</i>
1:05 – 1:10pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Lawrence Glazer, Mayflower Advisors• <i>Intro: John Scully, Senior Managing Director, Market Leader – Private Wealth, Nuveen</i>
1:10 – 1:30pm	Market Outlook: Why Investors Should Continue to Climb the Wall of Worry <ul style="list-style-type: none">• Michael Arone, Chief Investment Strategist, State Street Global Advisors• Moderator: Victor Livingstone, Morgan Stanley Private Wealth Management• <i>Intro: David Fredrick, Regional Consultant, State Street Global Advisors</i>
1:30 – 1:45pm	Networking Break
1:45 – 1:50pm	SHOOK Ones: My Best Idea <ul style="list-style-type: none">• Darrin Gold, UBS Wealth Management• <i>Intro: Dylan Ferrante, Associate VP Marketing Strategist, SHOOK Research</i>
1:50 – 2:10pm	Solving the World's Safety Problem: Rise of a New Prime – Anduril Industries <ul style="list-style-type: none">• Allison Lazarus, Head of Investor Relations, Anduril Industries• Moderator: Tim Maul, Head of Investor Relations, Balerion Space Ventures
2:10 – 2:30pm	Exploring a Growing Opportunity Set in Real Assets <ul style="list-style-type: none">• Gary Rozier, Senior Managing Director, Real Assets Management Team, Blue Owl• Moderator: Max Tanner, Head of Internal Sales, Blue Owl
2:30 – 2:50pm	Ideas from the Winner's Circle® <ul style="list-style-type: none">• Raj Sharma, Merrill Private Wealth Management• Moderator: Rick Henn, Divisional Sales Director - Northeast, Invesco• <i>Intro: Jeff Murphy, Market Leader, Invesco</i>
2:50 – 3:10pm	Energy Sector – Implication of the Tariffs <ul style="list-style-type: none">• Eva Pao, Principal, Co-Founder & Co-Portfolio Manager, Energy Income Partners• Moderator: Ron Insana, Senior Analyst for CNBC
3:10 – 3:30pm	Engaging with Your Clients During Uncertainty <ul style="list-style-type: none">• Jeffrey Swett, UBS Wealth Management• Mary Mullin, Merrill Wealth Management• Moderator: Eric Ring, Managing Director, Divisional Sales Head, Janus Henderson Investors• <i>Intro: Luke Bartow, Associate VP Event Programming, SHOOK Research</i>
3:30 – 3:35pm	The Last Word <ul style="list-style-type: none">• Lindsey Nacht, Vice President Director of Operations, SHOOK Research

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3:35 – 4:35pm

Cocktail Reception