Forbes | SHOOK

TOP TEAMS SUMMIT

MARCH 3 – 5, 2025 | MIAMI BEACH, FL

#ForbesSHOOKTopTeams

Monday, March 3, 2025

TIME	SESSION & SPEAKER	LOCATION
3:30 – 5:00pm	**Registration**	OCEAN LAWN
4:00 – 6:00pm	**Welcome Reception**	OCEAN LAWN
6:30pm	**Dine-Arounds with Partners**	

Tuesday, March 4, 2025

CE CREDITS AVAILABLE

TIME	SESSION & SPEAKER	LOCATION
7:00 – 8:00am	**Breakfast**	LUSTER GALLERIE
8:00 – 8:05am	**Welcome, America's Best Teams** • Liz Shook, Co-Founder & COO, SHOOK Research	SPARKLE BALLROOM
8:05 – 8:15am	**The Match** • R.J. Shook, Co-Founder & President, SHOOK Research, Senior Forbes Contributor	
8:15 – 8:30am	**SHOOK Ones: Our Team's Best Idea** • Nestor Vicknair, Merrill Wealth Management • Kyle Kelley, Merrill Wealth Management • Moderator: Steve Samuels, Merrill Wealth Management & The Private Bank Communications Executive • *Introduction: Maddie Hart, Senior Director, National Account Manager, Columbia Threadneedle Investments*	
8:30 – 8:50am	**Thoughts for Advisors, Teams, and Clients** • Raj Bhatia, Merrill Private Wealth Management • Sue van der Linden, Morgan Stanley Wealth Management • Moderator: John Nersesian, Head of Advisor Education, PIMCO • *Introduction: Steven Pogorelec, EVP, Western Divisional Sales Manager, U.S. Global Wealth Management, PIMCO*	
8:50 – 9:10am	**A Conversation with Scott Kapnick** • Scott Kapnick, Chief Executive Officer, HPS Investment Partners • Moderator: Christopher Toomey, Morgan Stanley Private Wealth Management • *Introduction: John Christmas, Co-Head of Business Development & Investor Relations, HPS Investment Partners*	
9:10 – 9:30am	**Areas of Focus for 2025: The Tactics of the Elite** • Rob Montella, Vice President, Performance Coach, First Trust	
9:30 – 9:50am	**How Top Teams Can Maximize Tax Efficiencies for Top Clients** • Travis Musgrave, Merrill Wealth Management • Andy Harbour, Graystone Consulting from Morgan Stanley • Moderator: Robert Holderith, Head of PGIM Custom Harvest, PGIM Investments • *Introduction: Jonathan Koss, Vice President, Regional Sales Coordinator, PGIM Investments*	
9:50 – 10:05am	**Snack Break**	
10:05 – 10:25am	**Allocate Like an Institution: Trends for 2025 and Beyond** • David Levi, Managing Partner and Chief Executive Officer of Brookfield's Global Client Group • Moderator: Stephen Scanapicco, Morgan Stanley Wealth Management • *Introduction: Nicole Pecoraro, Senior Vice President, Brookfield Oaktree Wealth Solutions*	

10:25 – 10:45am	**Conversation With America's #1 Advisor & Team** • Jeff Erdmann, Merrill Private Wealth Management • Erin Cleary, Client Associate, The Erdmann Group • Glen Mathews, Investment Management Specialist, The Erdmann Group • Dijana Stanisic, Private Wealth Management Specialist, The Erdmann Group • *Introduction: Lindsey Nacht, Vice President / Director of Operations, SHOOK Research*	
10:45 – 11:05am	**Building the Future of Infrastructure** • Sean Klimczak, Global Head of Infrastructure and Chairman of BXINFRA • Moderator: Joe Lohrer, Senior Managing Director & Head of U.S. Retail Sales, Blackstone Private Wealth Solutions	
11:05 – 11:10am	**SHOOK Ones: Our Team's Best Idea** • David Berdon, Morgan Stanley Private Wealth Management • *Introduction: Jacob Shook, Senior Analyst, SHOOK Research*	
11:10 – 11:30am	**From Laggard to Leader: Identifying AI Opportunities in Healthcare** • Tim McCarty, Research Analyst, Janus Henderson Investors • Brandon Bergstrom, Merrill Private Wealth Management • *Introduction: Jeff Pawliger, Executive Director, Advisor Solutions Group, Janus Henderson Investors*	
11:30 – 11:45am	**Refreshment Break**	**LUSTER GALLERIE**
11:45am – 12:25pm	**Breakouts**	**SPLASH ROOMS**
	Breakout #1: Survey Says: Insights on Allocating to Alts • John Sievers, Managing Director and Head of The Alts Institute, Brookfield Oaktree Wealth Solutions • Nicole Pecoraro, Senior Vice President, Brookfield Oaktree Wealth Solutions	**SPLASH 9-10**
	Breakout #2: Team Compensation: Best Practices and Pitfalls to Avoid • Manuel Escobio, Merrill Private Wealth Management • Eric Applewhite, Morgan Stanley Wealth Management • Moderator: Paul Brunswick, Head of Invesco Global Consulting, Invesco	**SPLASH 11-12**
	Breakout #3: Ideas to Create the Optimum Service Model • Edmund Agresta, Morgan Stanley Private Wealth Management • Crystal Garrett, Ameriprise Financial Services • Moderator: Caroline Gundeck, Managing Director, Head of PWM, Client and Field Engagement, Morgan Stanley Wealth Management	**SPLASH 13-15**
12:35 – 1:40pm	**Lunch**	**SPARKLE BALLROOM**
12:50 – 1:10pm	**Things to Avoid Prior to Succession** • Liubruv Cabrera, Executive Director, Head of Advisor Legacy Program, Morgan Stanley • Moderator: Rob Meredith, Managing Director, Regional Director – Mid America, Morgan Stanley • *Introduction: Robert Bruno, Head of Retail Distribution, First Eagle Investments*	
1:10 – 1:40pm	**TBD**	

1:55 – 2:35pm	**Breakouts**	**SPLASH ROOMS**
	Breakout #1: Private Credit: Past, Present, and Future • John Christmas, Co-Head of Business Development & Investor Relations, HPS Investment Partners • Moderator: John Shadden, Morgan Stanley Private Wealth Management	**SPLASH 9-10**
	Breakout #2: Building Elite Financial Teams • Dryden Pence, Pence Wealth Management, LPL Financial • Katie Hancock, Morgan Stanley Wealth Management • Moderator: Robert Milliman, Managing Director, National Sales Manager, IBD Channel, Head of Practice Management, U.S. Wealth Solutions, First Eagle Investments	**SPLASH 11-12**
	Breakout #3: When Is It Time to Bring on a COO • Bill DeMatteo, Morgan Stanley Wealth Management • Mark Thorndyke, Merrill Wealth Management • Moderator: Ron Insana, Senior Analyst for CNBC	**SPLASH 13-15**
2:35 – 2:50pm	**Refreshment Break**	**LUSTER GALLERIE**
2:50 – 3:05pm	**SHOOK Ones: Our Team's Best Idea** • Michael Chudd, UBS Private Wealth Management • Jonathan Beukelman, UBS Private Wealth Management • Moderator: Heather Crist, Managing Director, Head of Field Engagement, WM USA, UBS Group AG • *Introduction: Madison Rizzo, Associate VP / Partnerships, SHOOK Research*	**SPARKLE BALLROOM**
3:05 – 3:25pm	**The Next Generation of Wealth Transfer** • Moderator: Jim Bergeron, Managing Director, Advisor Education, Nuveen	
3:25 – 3:45pm	**Opportunities in Private Credit** • Daniel Pietrzak, Global Head of Private Credit, KKR • Moderator: Richard Zinman, Morgan Stanley Private Wealth Management • *Introduction: Corry Hyer, Director, Senior Relationship Manager, KKR*	
3:45 – 4:05pm	**3 Hiring Techniques That Can Expand Your Advisory Team** • Kent Pearce, Merrill Wealth Management • Troy Nelson, Edward Jones • Moderator: Julie Genjac, VP, Managing Director, Applied Insights, Hartford Funds • *Introduction: Kevin Eberly, Regional Vice President, Advisor Consultant, Hartford Funds*	
4:05 – 4:15pm	**Snack Break**	**LUSTER GALLERIE**
4:15 – 4:35pm	**Emerging Trends and Opportunities for Todays Investors** • James DiChiaro, Senior Portfolio Manager, BNY Mellon Core Plus Strategy at Insight Investments • Meghan Donoghue, Principal, Real Assets Portfolio Strategist, Blue Owl • Moderator: Ron Insana, Senior Analyst for CNBC	**SPARKLE BALLROOM**
4:35– 4:50pm	**2025: A Year of Morphing Portfolios** • Richard Bernstein, CEO & CIO, Richard Bernstein Advisors • *Introduction: Rocco Scanniello, Executive Director, Advisor Solutions Group, Janus Henderson Investors* •	

4:50 – 5:10pm	**Ideas from the Winner's Circle** • Peter Rukeyser, UBS Private Wealth Management • Alex Williams, UBS Private Wealth Management • Moderator: Paul Brunswick, Head of Invesco Global Consulting, Invesco • *Introduction: Derek Witte, Market Leader, Invesco*	
5:10 – 5:40pm	**SHOOK® Best Idea Competition** • Liz Shook, Co-Founder & COO, SHOOK Research • Frank Berland, Managing Partner, SHOOK Research • Judge: Ken Correa, Managing Director, Head of Business & Client Development, Merrill Wealth Management • Judge: Caroline Gundeck, Managing Director, Head of PWM, Client and Field Engagement, Morgan Stanley Wealth Management • Judge: Amy Schoenherr, Director of Financial Advisor Recognition, Wells Fargo Advisors	
5:40 – 5:45pm	**Cocktails Countdown!** • Frank Berland, Managing Partner, SHOOK Research	
5:45 – 6:30pm	**Cocktail Reception**	**OCEAN LAWN**
6:30pm	**Dine Arounds with Partners**	

Wednesday, March 5, 2025

TIME	SESSION & SPEAKER	LOCATION
8:00 – 9:00am	**Breakfast**	**LUSTER GALLERIE**
9:00 – 9:05am	**Coffee with Lizzy** • Liz Shook, Co-Founder & COO, SHOOK Research	**SPARKLE BALLROOM**
9:05 – 9:10am	**SHOOK Ones: Our Team's Best Idea** • Ryan Bristol, UBS Private Wealth Management • *Introduction: Luke Bartow, Associate VP / Event Programming, SHOOK Research*	
9:10 – 9:25am	**Ideas for Team Growth** • Brian Cooke, Cooke Financial Group • Moderator: Ron Insana, Senior Analyst for CNBC	
9:25 – 9:45am	**Team Compensation to Foster Growth** • Andrew Vahab, J.P. Morgan Wealth Management	
9:45 – 10:05am	**Succession & G2 Teaming** • Phil Scott, J.P. Morgan Wealth Management • Rick Shanley, Chicago Private Wealth, LPL Financial • Moderator: Elizabeth Sieghardt, Head of Independent Employee Advisor Affiliations, LPL Financial	
10:05 – 10:25am	**Advisor to Leader** • Nelrae Ali, Array Private Investment Advisory Group | Wells Fargo Financial Network • Andrew Burish, UBS Wealth Management • Moderator: Cynthia Chamberlayne, Senior Investment Consultant, BNY Mellon Investment Management • *Introduction: Blake Pastore, Senior Associate VP / Advisor Services, SHOOK Research*	
10:25 – 10:450m	**Refreshment Break**	**LUSTER GALLERIE**

10:40 – 11:00am	**Rebranding Your Advisory Practice to Excel in Today's Market** • Charles Balducci, Merrill Wealth Management • Holly McNulty, Morgan Stanley Wealth Management • Moderator: Brie Williams, Global Head of Advisory Solutions & Wealth Intelligence, State Street Global Advisors	**SPARKLE BALLROOM**
11:00 – 11:20am	**New Frontiers in Space**	
11:20 – 11:25am	**SHOOK Ones: Our Team's Best Idea** • Alvin Spencer, Stifel • *Introduction: Kaili Moran, Planning Coordinator | Event Associate, SHOOK Research*	
11:25 – 11:30am	**The Last Word** • Liz Shook, Co-Founder & COO, SHOOK Research	

SHOOK® Connect

Looking to connect with the SHOOK® Research analyst who interviewed you? Please visit our Directory Booth in the Exhibitor Area, or email contact@shookresearch.com