

Forbes | SHOOK

ON-THE-ROAD

The Hyatt Centric Chicago



Tuesday,
May 3, 2022

TIME	SESSION & SPEAKER
12:00-1:00 pm	Lunch
1:00-1:10 pm	Opening Remarks — RJ Shook , Founder, SHOOK Research & Senior Forbes Contributor
1:10-1:15 pm	Invesco's Total CX — Debbie Michaelson , Market Leader & Sr. Advisor Consultant, Invesco
1:15-1:45 pm	Answering the Key Questions You are Getting from Clients t — Brian Levitt , Global Market Strategist, Invesco
1:45-1:55 pm	How Innovation is Changing Everything: Invesco QQQ — Richard Callaghan , Market Leader & Sr. Advisor Consultant, Invesco
1:55-2:25 pm	Positioning Portfolios for FED Tightening and the Risk of Persistent Inflation — Kathy Kriskey , Product Strategist, Commodities & Alternatives, Invesco — Taylor Watts , Sr. Client Portfolio Manager, Invesco Global Senior Loans — Moderator: Brian Levitt , Global Market Strategist, Invesco
2:25-2:40 pm	Best Practice Workshop
2:40-2:45 pm	SHOOK One's – My Best Idea — Nick LoMaglio , UBS Wealth Management
2:45-2:55 pm	Break
2:55-3:40 pm	Changing the Guard — Gary DeMoss , Managing Director, Consulting Development & Delivery, Invesco Global Consulting — Wayne Badorf , Executive Consultant, Invesco Global Consulting
3:40-4:25 pm	Succession Planning Workshop — Gary DeMoss , Managing Director, Consulting Development & Delivery, Invesco Global Consulting — Wayne Badorf , Executive Consultant, Invesco Global Consulting
4:25-4:45 pm	Leading Change — Steve Hefter , HLM Capital Wealth Management — Sharon Oberlander , Merrill Lynch Wealth Management — Moderator: Wayne Badorf , Executive Consultant, Invesco Global Consulting
4:45-4:50 pm	SHOOK Ones – My Best Idea — Ted Davis , Morgan Stanley Wealth Management
4:50-5:00 pm	Closing Remarks — Lindsey Nacht , Senior Associate VP, Research Manager, SHOOK Research
5:00-6:00 pm	Cocktail Reception