

2019 Forbes/SHOOK Top Advisor Summit

Masonic Temple, Detroit, MI

Who's Coming: Top Advisors/RIAs, Serena Williams, Chainsmokers, 21 Savage & Normani, Kevin Durant

Sunday
October 27, 2019

TIME	SESSION & SPEAKER
11:00 am	Registration begins
12:00 pm	Forbes Under 30 Venue opens
6:00 pm	SHOOK VIP opens
7:00 pm	Music Fest — Entertainment: Normani, 21 Savage, The Chainsmokers

Monday
October 28, 2019

9:00 - 9:10 am	Impact — RJ Shook, Founder, SHOOK Research & Forbes Contributor
9:10 - 9:15 am	SHOOK "Talks" — Malia Morales, Merrill Private Wealth Management
9:15 - 9:35 am	IMPACT: The New Value Proposition — Jennifer Iburguren, Ameriprise Financial Services — Tony Carpentieri, Merrill Private Wealth Management — Moderator: Brian Paterson, Sales Director, First Eagle
9:35 - 9:40 am	SHOOK "Talks" — Sara Rajo-Miller, Miracle Mile Advisors
9:40 - 10:05 am	Top of the Ranking: Two #1's Discuss the Future of their Practices — Seth Haye, Morgan Stanley Wealth Management — Rachel Gottlieb, UBS Financial Services — Moderator: Nick Cirbo, Senior Advisor Consultant, Invesco
10:05 - 10:25 am	Finding the Right Team Structures for a High-Impact Practice — Dana Nightingale, Obermeyer Wood — Blair Cornell, UBS Financial Services — Moderator: Kirsten Pickens, Head of Distribution, Chiron
10:25 - 10:30 am	SHOOK "Talks" — Josh Glass, Stifel
10:30 - 10:45 am	Marketing Your Team's Forbes Recognition — Danny Resnick, JP Morgan Securities — Rory O'Hara, Merrill Lynch Wealth Management — Moderator: Jessica Sibley, Chief Sales Officer, Forbes Media
10:45 - 10:55 am	Networking/Refreshments
10:55 - 11:35 am	Concurrent Breakouts Breakout Room 1. Building a Multi-Generational Practice — John O'Neil, Merrill Lynch Wealth Management — Sarah Damsgaard, JP Morgan Securities — Moderator: Bryan Thompson, UBS Financial Services

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TUESDAY
October 29, 2019

TIME	SESSION & SPEAKER
	<p>General Session Room</p> <p>2. Leveraging Technology to Streamline Efficiencies</p> <ul style="list-style-type: none"> — Brandon Schlesinger, Morgan Stanley Private Wealth Management — Jacob Dunn, Merrill Private Wealth Management — Moderator: James Costabile, Managing Director, Morgan Stanley Investment Management
12:20 - 12:35 pm	Networking/Refreshments
12:35 - 1:00 pm	Next-Gen Roundtables
1:10 - 2:00 pm	Lunch – Hosted by Hartford Funds
2:00 - 2:30 pm	Role Model Roundtables
2:40 - 3:10 pm	<p>SHOOK Tank “Open Mic”</p> <ul style="list-style-type: none"> — Be prepared to share your best idea in 90 seconds (prize for best idea)
3:10 - 3:35 pm	<p>Compensating and Incentivizing Team Members</p> <ul style="list-style-type: none"> — James Murphy, Merrill Lynch Wealth Management — Elizabeth Evans, Evans May Wealth — Moderator: David Hescheles, Managing Director, Hartford Funds
3:35 - 4:00 pm	<p>Building Your Practice Through Acquisitions</p> <ul style="list-style-type: none"> — Anh Tran, JanHobbs Financial Group — Thomas Fautel, Seventy2 Capital — Moderator: Dodd Kittsley, Director, Davis Advisors
4:00 pm	<p>Closing Remarks</p> <ul style="list-style-type: none"> — Frank Berland, Managing Director, SHOOK Research
4:25 pm	Serena Williams
7:30 - 8:30 pm	SHOOK Cocktail Reception at Deluux Fluxx – Hosted by Davis Advisors
9:00 - 12:00 am	Forbes Pub Crawl at The Belt
9:00 - 9:10 am	<p>Welcome Remarks</p> <ul style="list-style-type: none"> — Frank Berland, Managing Director, SHOOK Research
9:10 - 9:15 am	<p>SHOOK “Talks”</p> <ul style="list-style-type: none"> — Steve D’Amico, Morgan Stanley Wealth Management
9:15 - 9:40 am	<p>Building Scale: Managing 3,000+ Relationships</p> <ul style="list-style-type: none"> — Ryan Magnesen, Morgan Stanley Wealth Management — Rees Mason, Merrill Lynch Wealth Management — Moderator: David Hescheles, Managing Director, Hartford Funds

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9:40 - 9:50 am	SHOOK "Talks" — Nick LoMaglio, UBS Financial Services
9:50 - 10:15 am	Fastest Growing Next-Gen's — JC Cardente, Merrill Lynch Private Wealth Management — Liz Weikes, JP Morgan Securities — Moderator: Crystal Ho, Morgan Stanley Wealth Management
10:15 - 10:30 am	Networking/Refreshments
10:30 -10:50 am	Unique Service Models — Will Rose, UBS Financial Services — Vikas Mohindra, Merrill Lynch Wealth Management — Robert Chen, Morgan Stanley — Moderator: Cesar Bastidas, Director, Head of Internal Sales, New York Life Investments
10:50 -10:55 am	SHOOK "Talks" — John Mele, Morgan Stanley Wealth Management
10:55 -11:15 am	How Successful Advisors Structure Their Day — Jason Mingelgreen, Stifel — Kyle Kelley, Merrill Lynch Wealth Management — Moderator: Matt Gallo, Merrill Lynch Wealth Management
11:15 -11:30 am	Branding Your Team and Practice — Tony Carpentieri, Merrill Private Wealth Management — Kevin Gegorski, Ameriprise Financial — Moderator: Carryn McLaughlin, UBS Private Wealth Management
11:30 - 11:50 am	Building the Practice of the Future — Francois Viljoen, Wells Fargo Advisors — Jennifer Trembley, Ameriprise Financial
11:50 - 12:00 pm	Closing Remarks — RJ Shook, Founder, SHOOK Research & Forbes Contributor
Lunch	
1:30 pm	Kevin Durant