SHOOK® RESEARCH

Forbes/SHOOK The Road Ahead - Virtual Top Advisor Summit

Thursday, March 4, 2021

TIME	SESSION & SPEAKER
11:00 - 11:10 am	Opening Remarks — R.J. Shook, Founder, SHOOK Research & Senior Forbes Contributor — Liz Shook, COO & Co-Founder, SHOOK Research — Frank Berland, Managing Partner, SHOOK Research
11:10 - 11:25 am	The Future of Our Practices — Lyon Polk, Morgan Stanley Private Wealth Management — Wendy Holmes, UBS Private Wealth Management — Moderator: John Matthew, Group MD, Head of PWM & UHNW, UBS Wealth Management
11:25 - 11:40 am	Inflation Opportunities Abound! — Richard Bernstein, CEO & CIO, Richard Bernstein Advisors
11:40 - 11:55 am	The After-Tax Advisor – What You Should Be Doing Now? — Jennifer Haggerty, Merrill Private Wealth Management — Matthew Fleissig, President, Pathstone — Moderator: John Moninger, Managing Director Retail Sales, Eaton Vance Advisor Institute
11:55 - 12:10 pm	The Road Ahead: Restoring Team Balance — Rick Buoncore, MAI Capital Management — Adam Carlin, Morgan Stanley Private Wealth Management — Moderator: Julie Genjac, Managing Director, Applied Insights, Hartford Funds
12:10 - 12:25 pm	Tuning Out the Tweets — Chris Davis, Chairman & Portfolio Manager, Davis Advisors
12:25 - 12:40 pm	Leading a Resilient Team — Mark Thorndyke, Merrill Lynch Wealth Management — Moderator: Dr. Kevin Elko, Advisor Advancement Institute, New York Life Investments
12:40 - 12:55 pm	The Future of America and What It Means for Your Money — Anthony Scaramucci, Founder & Managing Partner, SkyBridge Capital
12:55 - 1:10 pm	The Antidote to Conventional Wisdom — Brian Wesbury, Chief Economist, First Trust Portfolios
1:10 - 1:25 pm	Fireside with America's #1 Wealth Advisor — Jeff Erdmann, Merrill Private Wealth Management — Moderator: Joseph Lohrer, Sr. Managing Director, Blackstone
1:25 - 1:45 pm	Politics and Tax Policy: Planning Tops for HNW Investors — John Emerson, Vice Chairman – Capital International, Inc.; Capital Group | American Funds — Leslie Geller, Wealth Strategist, Capital Group | American Funds — Moderator: Michael Schweitzer, Head of HNW, Capital Group | American Funds
1:45 - 2:00 pm	The Frictionless Economy — John Porter, CIO & Head of Equity, BNY Mellon — Introduction: Chris Hazelton, VP & Sr. Product Strategist, BNY Mellon
2:00 - 2:15 pm	Blind Spots in Planning & The Pandemic — Nazie Saffari-Moini, Merrill Lynch Wealth Management — Scott Sparks, Northwestern Mutual
2:15 - 2:30 pm	Top of Mind For Clients — Jason Chandler, Head of Wealth Management, UBS Wealth Management — Angela Mwanza, Senior Vice President, UBS Private Wealth Management

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2:30 - 2:45 pm	**CONCURRENT BREAKOUTS** Breakout #1: The Future of Sustainable Investing is TODAY — Katherine Collins, Head of Sustainable Investing & Investment Mgmt, Putnam Investments — Moderator: Bruce Burrows, Morgan Stanley Wealth Management Breakout #2: What Clients Really Want…and What Advisors Need To Do Right Now — Carrie Coghill, Commonwealth, Coghill Investment Strategies — Jimmy Lee, Wealth Consulting Group — Moderator: Ryan Beasley, Executive VP – Individual Division, Ameritas
2:45 - 3:00 pm	**CONCURRENT BREAKOUTS** Breakout #1: Diversify Away from the Traditional 40 — Dr. Randy Anderson, CEO & Chief Economist, Griffin Capital Asset Mgmt — Jeremy Beal, Managing Director, Head of Alternative Investments, Morgan Stanley Wealth Management Breakout #2: The New Age of Growth — Jennifer Shydler, Merrill Lynch Wealth Management — Marc Ackerman, Wells Fargo Advisors — Moderator: Steve Samuels, Managing Director, Merrill Lynch Wealth Management
3:00 - 3:15 pm	Discussion with Merrill's Andy Sieg — Andy Sieg, President, Merrill Lynch Wealth Management — Moderator: Liz Shook, COO & Co-Founder, SHOOK Research
3:15 - 3:30 pm	Maintaining Our True North Amidst Market Noise — Matt McLennan, Portfolio Manager & Head of Global Value, First Eagle Investment Mgmt
3:30 - 3:45 pm	Debunking Popular Myths About Value Investing — Andrew Wellington, Co-Founder, Managing Partner & CIO, Lyrical Asset Mgmt — Moderator: George Dunn, Merrill Lynch Wealth Management
3:45 - 4:00 pm	Spotlight on Global: Rethinking Where to Find Opportunity — Ryan Caldwell, Managing Director, FS Investments — Moderator: Alex Williams, UBS Private Wealth Management
4:00 - 4:15 pm	Bottoms Up Stock Picking in a Digital World — Mario Gabelli, Chairman, CEO & Founder, GAMCO Investors, Inc.
4:15 - 4:30 pm	International: An Unanticipated Growth Story — James Gautrey, Portfolio Manager, Schroders — Todd Morris, Lead Portfolio Manager, Polen Capital — Moderator: Ron Insana, Senior Advisor, Schroders
4:30 - 4:45 pm	Strike the Right Balance of the S&P 500 with an Equal-Weight Approach — John Feyerer, Senior Director of Equity ETF Product Strategy, Invesco
4:45 - 5:00 pm	Becoming the Advisor for Life — Mark Cortazzo, MACRO Consulting Group — Sarah Damsgaard, J.P. Morgan Wealth Management — Moderator: Steve Gresham, CEO, The Execution Project & Educational Advisor, Alliance for Lifetime Income
5:00 - 5:10 pm	The Four Pillars of the New Retirement — Ken Cella, Principal – Client Strategies Group, Edward Jones
5:10 - 5:25 pm	Will Washington Wreck the Economy Recovery – and Thereby Batter Stocks? — Steve Forbes, Chairman & Editor-in-Chief, Forbes Media
5:25 - 5:30 pm	Closing Remarks