

Astoria Macro Summit 2026 Agenda

11:30 AM - 12:00 PM

Registration & Lunch

Grab & Go

12:00 PM - 12:10 PM

Welcome Remarks

Equity Outlook

12:10 PM - 12:55 PM

Mike Wilson, Chief U.S. Equity Strategist & CIO at Morgan Stanley

12:55 PM - 1:35 PM

Fixed Income Outlook

Jeffrey Sherman, Deputy CIO at Doubleline

1:35 PM - 1:50 PM

Refreshment Break

Tactical Panel

1:50 PM - 2:30 PM

Mary Ann Bartels, Chief Investment Strategist at Sanctuary Wealth
and Daniel Russo, Co-CIO at Potomac

2:30 PM - 3:15 PM

Tax Efficient Investing

Wesley Gray, CEO at ETF Architect, Jonathan Powell, Principal at Summit Trail
Advisors, and Srikanth Narayan, Founder & CEO at Cache

3:15 PM - 3:30 PM

Refreshment Break

3:30 PM - 4:20 PM

Public and Private Portfolio Construction

Michael Arone, Chief Investment Strategist at State Street,
Robert Bush, Director, Global Investment Research at FTSE Russell, and
Rusty Vanneman, CIO at FNBO Wealth

4:20 PM - 4:30 PM

Closing Remarks

4:30 PM - 6:00 PM

Refreshments & Networking