SS&C DELIVER 19 ORLANDO

Delivering the Future

September 17-19, 2019

At Deliver 2019, we have a terrific lineup of informational sessions planned for advisory firms. When building your agenda, we recommend selecting the following topics:

Tuesday, September 17 | Wednesday, September 18 | Thursday, September 19

Time	Session Title	Description
9:30 am – 10:20 am	Embracing the Future of Wealth Management	Today's advisors need to elevate their technology game in the face of a variety of trends. Join Black Diamond leaders as they discuss the current financial landscape and how technology is shaping the advisory practice of the future. You'll also get a glimpse into how Black Diamond is positioning itself to stay ahead of the curve on your behalf.
10:50 am – 11:40 am	Think Beyond Behavioral Finance – Neuroscience Meets Investing	Can neuroscience make us better investors? Hear what happens when CIO Eric Bennett returns to investing after switching gears to work in brain science with one of the world's leading cognitive neuroscience institutes. Eric's eye-opening point of view will touch upon the biology of behavioral finance, how neuroscience can teach us to make the most of the best part of our brain, achieve better decision making with big data and conclude with the implications it will have on investing in the next decade.
1:10 pm – 2:00 pm	Proactive Approaches to Risk Management and Organizational Resilience	As we survey our organizations, customers, markets, and environment, we find that risk management has taken on an increasing organizational importance as we strive to identify, assess, control, and track those hazards that could put our organizational strategy and objectives at risk. Today's panel discussion draws upon the expertise of three panelists with a broad view of risk management in the context of geopolitical challenges, increasing technological disruption, and rapidly advancing cyber threats.
2:10 pm – 3:00 pm	2020 Vision: Market Outlook	How will emerging technologies impact the way we transact business in 2020 and beyond? Join the SS&C Learning Institute for an educational session discussing how to future-proof your operations in the increasingly dynamic environment we are working in. Exploring the impact of data science, machine learning and artificial intelligence on the financial services industry, we will cover the skills that our future employees are going to need and how to attract, train and retain the future workforce!

Tuesday, September 17 ***(cont.)***

Time	Session Title	Description
3:30 pm – 4:20 pm	Modernize the Advisor-Investor Dialogue	Equip yourself with tools to elevate your advisor-client dialogue and help further develop meaningful, long-term relationships. This session will feature enhancements to the Black Diamond Client Experience, show our advanced Relationship Timeline in action, and highlight ways you can best optimize technology to demonstrate your value to both prospects and clients.
4:30 pm – 5:20 pm	**Option 1:** Streamlining Client Onboarding: Black Diamond & Salentica	The future of onboarding and leveraging integrations between Black Diamond, Salentica and major custodians will be on display as this session tracks the all-important client lifecycle from prospect to account opening. Join us to review key steps so you can maximize efficiency, elevate client service and grow your business.
	Option 2: Chief Operation Officers Speak	The role of a Chief Operating Officer includes aligning behaviors, organization design, compensation and goals across the firm. From identifying key issues to finding and investing in the best talent and systems these panelists lead corporate planning efforts and execute core strategy in concert with their colleagues in firm leadership. Join us to gain insight into the challenges our panelists face, how they look to solve them and where they see the biggest opportunities for their firms going forward.

Time	Session Title	Description
8:30 am – 9:20 am	**Option 1:** Maintaining Perfect Harmony: Black Diamond Rebalancer	Come see how Black Diamond's next-gen Rebalancer has grown since its unveiling last year. Notably, we will present our latest enhancement - straight-through trade processing via FIX connectivity. We will also demonstrate other core features including, proactive monitoring, tax-efficient rebalancing and enhanced modeling.
	Option 2: Chief Compliance Officers Speak	Chief compliance officers (CCOs) must balance the art of meeting increased regulations as their businesses grow and technology advances. Join our panelists for a game-changing discussion on hot topics ranging from the 2019 SEC Exam Priorities, to KYC and technology including data protection and cybersecurity. They'll share their approaches to ensuring efficiency, quality and proper cross-firm governance.
9:30 am – 10:20 am	**Option 1:** Looking Beyond the BI and AI Hype	BI, AI, predictive analysis, big data, and machine learning are the latest trends that firms believe are necessary to succeed, but many firms don't understand what these really mean or entail. Industry consultant, Sue Glover, leads this thought-provoking session on what these analytic tools mean for your firm, practical applications that incorporate these analytics, and why understanding what's behind the results is crucial to your decision-making process.
	Option 2: LAB: Maximizing Your Use of Black Diamond Billing	This hands-on lab will help you maximize your use of the all-new Billing solution within Black Diamond. We'll cover BlueSky conversion along with the new configurations that will help you streamline the Billing Run process. Then, we'll walk you through some functionality enhancements like breakpoint settings, a custom export builder, and rep fee splits so you can start optimizing your use of this powerful engine.

Wednesday, September 18 ***(cont.)***

Time	Session Title	Description
10:50 am – 11:40 am	Hybrid Robo Compliance: The Best of Both Worlds	Wealth management firms are under increasing pressure to adopt technology solutions that simplify their compliance workflows while assuring they're better prepared for an audit. Join Mac Bartine, CEO of SmartRIA, as he discuss how large RIAs are using Black Diamond-integrated software in conjunction with human intelligence to streamline and improve compliance surveillance and oversight. Using case studies as illustrations, you'll hear Mac as he paints a picture of how a hybrid robo compliance model works.
1:10 pm – 2:00 pm	Empowering Data Management Tools	Data is more powerful when it's used in new ways to create in-the-moment personal connections. In this session, Black Diamond product experts will discuss data management tools and the ways in which were helping you turn data into actionable intelligence while providing even greater transparency into supporting processes.
2:10 pm – 3:00 pm	Lessons from the Experts: M&A and Succession Planning	The M&A trend shows no signs of slowing down and there are opportunities for both buyers and sellers. Join us to learn from some of the most experienced M&A and succession experts in the industry and gain insights to move your firm's plan forward.
3:30pm – 4:20 pm	**Option 1:** Integration Showcase: All the Right Connections	Key integrations enrich your overall client experience by helping you save time, manage relationships, and attract new clients. We invite you to join the Black Diamond team, along with some of their integration partners, during this interactive presentation. Product experts will demonstrate how you can leverage fully integrated partner solutions for both you and your clients.
	Option 2: LAB: Maximizing Your Use of Black Diamond Billing	This hands-on lab will help you maximize your use of the all-new Billing solution within Black Diamond. We'll cover BlueSky conversion along with the new configurations that will help you streamline the Billing Run process. Then, we'll walk you through some functionality enhancements like breakpoint settings, a custom export builder, and rep fee splits so you can start optimizing your use of this powerful engine.

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Time	Session Title	Description
9:00 am – 9:50 am	Accenture: Research Findings on The Future of the RFP Process	The search and selection process for outsourced services, commonly referred to as the RFP, has not adapted to our industry that continues to evolve at a rapid pace. Many investment managers rely on dated methods to conduct searches and ultimately for choosing a partner. Poorly designed RFPs may lead to what is believed to be the best fit but could result in a misalignment partnership down the road. Bill Beaulieu from Accenture will share findings from a study conducted with several top administrators that evaluated the typical RFP approach to better understand the major pain points. The discussion will include ideas on how the practice should evolve or be completely transformed to enable a more optimal buying experience. Walk away from this session with better insights into how asset managers should engage potential administrators to ensure they are selecting the best partner.
10:00 am – 10:50 am	Best Places to Work: Competing for Top Talent	In today's competitive talent market, firms need to show that they are an employer of choice. Advisory firms honored with the title of Best Place to Work do innovative things to attract and retain the best and the brightest. From free lunches, to paid time off to volunteer, to unique employee ownership models, a panel of top advisory firms will discuss the initiatives they leverage to create positive work environments.
11:00 am – 11:50 am	Accessing European Capital for US Managers	This panel discussion will center around SS&C and the European industry partners. Several key themes including the European opportunity, navigating European funds, Fundraising under AIFMD and MIFID and best practices for US Managers will be discussed. The panel will also outline the opportunities available to US managers when launching a European regulated product, while helping to navigate challenges and provide compelling solutions.