



SS&C | ADVENT

engage

October 14–15, 2020

SS&C Advent Engage 2020

SS&C Advent's first fully virtual client conference, Engage offers 30+ informative product sessions, panel discussions, Q&A opportunities and interactive educational sessions specific to the products you use. Held over two half-days, Engage is designed to provide you with the forward-looking industry insights and improved product knowledge critical to your daily workflow.

Join us to hear from industry experts on timely, curated topics, to interact 1:1 with our product experts for live support and to network with like-minded peers.

October 14–15, 2020

1:00–5:00 pm each day

[Visit our site to register or sign-in for the conference](#), and dive into our agenda below to plan your personalized conference track!

Agenda

DAY 1 – Wednesday, October 14

	APX	Geneva	Black Diamond	Other Solutions
12:45 – 1:00 PM	Networking & Solutions Showcase			
1:00 – 1:40 PM	Two Takes, One Advent			
1:55 – 2:35 PM	APX, Moxy and Advent Genesis: Today, Tomorrow and Beyond	Geneva Family: Today, Tomorrow and Beyond	Shaping a Better Future for Wealth Management	Tamale Research Management: Today, Tomorrow and Beyond
2:50 – 3:30 PM	Client Panel Perspective: Advent Outsourcing Services	Optimize your Operations with Advent Outsourcing Services and Geneva	Fully Connect Your Client Lifecycle	Professional Services: Experience, Knowledge, Solutions
3:40 – 4:25 PM	Advent Suite: Your Feedback on Our Roadmap!	Geneva Technology Update, Performance Optimization, and Data Warehousing	Streamline Model Management, Rebalancing, and Trading	Syncova: Today, Tomorrow and Beyond
4:25 – 5:00 PM	Networking & Solution Showcase			

Agenda

DAY 2 – Thursday, October 15

	APX	Geneva	Black Diamond	Other Solutions
12:45 – 1:00 PM	Networking & Solutions Showcase			
1:00 – 1:40 PM	Client Perspectives: C-Suite Panel Discussion			
1:55 – 2:35 PM	The Wide World of APX Tools and Workflows	Geneva Family: Product and Roadmap Update	Efficient & Accurate Alternatives Reporting	Digitizing the Client Experience
2:50 – 3:30 PM	Portfolio Management and Trading for Asset and Wealth Managers	Live Q&A With Geneva Experts	Realize the Possibilities: Black Diamond Integrations	Going from Reactive to Proactive with CRM
3:40 – 4:25 PM	Re-Imagining Your Outsourcing Experience	LIBOR to SOFR Transition with Geneva	Your Data: Configured for Insights & Automated for Efficiency	Advent Data Solutions: Investing in Your Data Needs
4:25 – 5:00 PM	Networking & Solution Showcase			

Session Details – All SS&C Advent Solutions

Networking & Solution Showcase | BOTH DAYS, 12:45 – 1:00 PM, 4:25 – 5:00 PM

Network with other attendees and stop by the Solution Showcase!

Two Takes, One Advent | DAY 1, 1:00 – 1:40 PM

SS&C Advent General Managers Karen Geiger and Steve Leivent kick off our first Advent Engage conference with an insightful discussion on the future of Advent. They will share perspectives on leading through change and the transition of brands and products, and dive into our product road map. Please join us as we welcome our new leadership team for this not-to-be-missed introduction.

Client Perspectives: C-Suite Panel Discussion | DAY 2, 1:00 – 1:40 PM

Please join us for a thought-provoking client panel discussion touching on top concerns in the c-suite. Topics include motivating and developing staff in a virtual work environment, the implications of regulatory shifts, and strategic priorities for 2021.

Session Details – APX & AOS

APX, Moxy and Advent Genesis: Today, Tomorrow and Beyond | DAY 1, 1:55 – 2:35 PM

This award-winning suite for investment managers continues to provide powerful new functionality to make firms more efficient and scalable. Our product managers will share important new features and walk you through our roadmap and future vision.

Client Panel Perspective: Advent Outsourcing Services | DAY 1, 2:50 – 3:30 PM

Hundreds of firms have selected Advent Outsourcing Services to reduce risk in operations, increase scalability, improve DR and generate a proven ROI. Intrigued? Hear directly from panelists whose firms have successfully adjusted to shifting regulations and entered new markets, all while efficiently managing costs.

Advent Suite: Your Feedback on Our Roadmap! | DAY 1, 3:45 – 4:25 PM

Your feedback matters! This is your opportunity to provide and see collective input that helps us prioritize future investments in the APX and Moxy suite. Bring your energy, initiatives and ideas to this highly interactive, future-shaping session.

Session Details – APX & AOS continued

The Wide World of APX Tools and Workflows | DAY 2, 1:55 – 2:35 PM

Are you aware of the vast universe of complimentary APX tools and products? Whether it's composite management, billing, custodial data, CRM, performance management, report packaging, or cash management, we offer solutions to streamline your key processes. Hear directly from peers and Advent professionals on their experience working with standard and custom tools to streamline clunky, inefficient workflows. This is primarily an APX session but there will be some discussion on Moxy.

Portfolio Management and Trading for Asset and Wealth Managers | DAY 2, 2:50 – 3:30 PM

Explore how portfolio managers in the front office are using the power of Advent Genesis to streamline the process of order creation, rebalancing and cash management.

"With Advent Genesis, we are able to double or triple our accounts without increasing the time we'll spend on rebalancing or trade generation." Glen Pichanick, AVP Trading, Lincluden Investment Management

Session Details – APX & AOS continued

Re-Imagining Your Outsourcing Experience | DAY 2, 3:45 – 4:25 PM

COOs are looking beyond in-house capabilities for effective back office solutions. For help identifying which activities to outsource and which to keep in-house, join our experts from Advent Outsourcing Services to shed light on crucial areas of due diligence. Learn how to assess for issues like risk reduction, business continuity and process/workflow transparency, and to hear more about exciting upcoming additions to our roadmap.

Session Details – Black Diamond

Shaping a Better Future for Wealth Management | DAY 1, 1:55 – 2:35 PM

The Black Diamond leadership team will cover a variety of topics including the state of the advisory market, platform vision, service experience, upcoming enhancements, partnerships and more. We'll be discussing future trends and opportunities, and how innovation creates value for advisors. Engage directly with advisory attendees during this special session.

Fully Connect Your Client Lifecycle | DAY 1, 2:50 – 3:30 PM

Join the Black Diamond team as they unveil Client View – an integrated command center for advisors that empowers you to better manage, analyze and speak to your clients. This collaborative and trusted space allows the advisor and client experience to truly converge. During this session, we will also give you a peak into the future, including a different way to look at financial planning.

Streamline Model Management, Rebalancing, and Trading | DAY 1, 3:45 – 4:25 PM

Join the Black Diamond team to discover the latest in rebalancing technology. Boost internal productivity with features like efficient model maintenance, approval requests, sharing trade analysis summaries, and cross-application workflows. We'll also feature client feedback and how it plays a critical role in driving future enhancements.

Session Details – Black Diamond continued

Efficient & Accurate Alternatives Reporting | DAY 2, 1:55 – 2:35 PM

Black Diamond has teamed up with SS&C GlobeOp, the world's largest fund administrator, to automate the data entry and reporting for your private funds and CITs. Join us to learn how this partnership can drive new opportunities for your firm.

Digitizing the Client Experience | DAY 2, 1:55 – 2:35 PM

With the digitization of our everyday lives, your clients now expect full 24/7 visibility into their investments. With APX and Axys, you can give your clients the digital transparency they want and your advisors the tools they need to build their business. In this session, you'll learn how SS&C solutions like Black Diamond Link or Investrack can plug into your existing systems and increase the value you provide to your clients.

Realize the Possibilities: Black Diamond Integrations | DAY 2, 2:50 – 3:30 PM

Integrations are a fundamental piece of the Black Diamond Wealth Platform. Our investment in both building relationships and delivering strong technical connections with outside solutions provides advisory firms with an integrated platform to meet their needs. Join this session to learn about our growing number of integration options and hear directly about the road ahead.

Session Details – Black Diamond continued

Your Data: Configured for Insights & Automated for Efficiency | DAY 2, 3:45 – 4:25 PM

Advisors are realizing true scale with Black Diamond's sophisticated aggregation, reconciliation, and accounting engine. In this session, product leaders will discuss our new and enhanced aggregation and transparency capabilities, as well as added flexibility in our data model. You will also have the opportunity to see the new vision for our Business Intelligence tool.

Session Details – Geneva

Geneva Family: Today, Tomorrow and Beyond | DAY 1, 1:55 – 2:35 PM

Kick off our virtual conference with a strategic overview of Geneva's award-winning solution suite. Get a glimpse into exciting product innovations delivered this year and learn about the powerful functionality planned for the future.

Optimize your Operations with Advent Outsourcing Services and Geneva | DAY 1, 2:50 – 3:30 PM

Are routine operations deterring your Alpha Generation? Learn how you can optimize your Geneva infrastructure without the operational and technical overhead. Our industry experts explore the opportunities available to empower your organization, streamline workflows, and minimize noise with Geneva® and Advent Outsourcing Services.

Geneva Technology Update, Performance Optimization, and Data Warehousing | DAY 1, 3:45 – 4:25 PM

Dive into the technical side of Geneva! From new features to boost accounting and reporting performance to hardware configurations enabling optimal processing capabilities, learn more about our latest developments in data warehousing solutions for fast and flexible access to Geneva data.

Session Details – Geneva continued

Geneva Family: Product and Roadmap Update | DAY 2, 1:55 – 2:35 PM

Join Geneva Product Managers for a deep dive into the latest user experience and core accounting features, including new workspaces, swap and bank loan processing, regulatory changes, investor accounting and task management workflows. Collective feedback will be captured to help us prioritize future investments in the product for 2021 and beyond.

Live Q&A With Geneva Experts | DAY 2, 2:50 – 3:30 PM

Hosted by the experts who know the product best, this informative and interactive forum is the perfect setting to bring your questions on all things Geneva. Interact directly with our Product Development team and get immediate feedback.

LIBOR to SOFR Transition with Geneva | DAY 2, 3:45 – 4:25 PM

The shift from LIBOR to reference rates like SOFR will reverberate across the industry. Our SS&C Advent team has been preparing diligently for this change, and Geneva is ready to support your business through the transition. Join us to hear our Product Development team's strategy to stay on top of this evolving industry shift and the upcoming Geneva releases meant to address it.

Session Details – Other Solutions

Tamale Research Management: Today, Tomorrow and Beyond | DAY 1, 1:55 – 2:35 PM

Tamale continues to provide excellence in research management software. New enhancements put powerful new functionality directly into users' hands to optimize the investment research process. Our product experts will share best practices and introduce how we're leveraging artificial intelligence with a new automated tagging engine for improved efficiency. We'll also touch on roadmap and future vision.

Professional Services: Experience, Knowledge, Solutions | DAY 1, 2:50 – 3:30 PM

Find out how clients are drawing superior value from their technology investments by leveraging Advent services. Learn about services available from Advent Professional services to enhance your back office.

Syncova: Today, Tomorrow and Beyond | DAY 1, 3:45 – 4:25 PM

Join the Syncova team for a strategic overview and deeper dive into the product's enhancements and roadmap. Get a glimpse into the most recent dashboard innovations and other key highlights of Syncova's real-time integration with Geneva, making it possible to configure and manage data synchronization between the two systems directly from its user interface.

Session Details – Other Solutions

Salentica: Going from Reactive to Proactive with CRM | DAY 2, 2:50 – 3:30 PM

Firms thrive when they can provide a convenient, personalized customer experience. A robust CRM specifically designed for your business needs creates a critical competitive advantage, allowing you to track and quickly assist your client base. Join our product team to learn how a smart CRM tool can set you up for customer relationship success by pairing technology with human insight.

Advent Data Solutions: Investing in Your Data Needs | DAY 2, 3:45 – 4:25 PM

Advent's Data Solutions suite has been helping clients with critical trade lifecycle data for over 20 years. In this session, learn how TransPort will apply custom rules and logic to standard ACD files, creating customized data for loading into Axys and APX, and how to streamline corporate actions processing with Advent Corporate Actions (ACA). Our product experts will share updates on future roadmap initiatives including AI and machine learning, as well as supporting our clients in the bi-directional flow of information with their counterparties.



ABOUT SS&C ADVENT

SS&C Advent, a business unit of SS&C, is helping over 4,300 investment firms in more than 50 countries—from established global institutions to small start-up practices—to grow their business and thrive. Delivering unparalleled precision and ahead-of-the-curve solutions for more than 30 years, we help our clients minimize risk, work together seamlessly, and shape the future of investment management.

For more information, visit www.advent.com or contact us at (800) 727-0605 or info@advent.com.

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