SS&C | ADVENT

# engage

## Agenda

**September 14–15, 2021**

# SS&C Advent Engage 2021

SS&C Advent's 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, and hear from like-minded professionals.

September 14–15, 2021

1:00–5:00 ET pm each day

# DAY 1 – Tuesday, September 14

| | AIS | Geneva | Black Diamond | Salentica | Other Solutions |
|---|---|---|---|---|---|
| 12:45 – 1:00 PM ET | Venue Open | | | | |
| 1:00 – 1:40 PM ET | SS&C Advent Leadership Insights for a Changing World | | | | |
| 1:55 – 2:35 PM ET | APX & Moxy: Today, Tomorrow and 2025 | It's all about that Tech! | Black Diamond: A True Financial Life Hub | How Advisors Use CRM Manage Their Pipeline | Client Portals: Empowering Around the Clock Engagement |
| 2:50 – 3:30 PM ET | Navigating the Competitive Landscape: A Technology Panel | What's all the talk about Alternative Managed Services? | Elevating Client Relationships with Technology | How Asset Managers Use CRM To Manage Their Distribution Channels | The Back-Office Evolution |
| 3:45 – 4:25 PM ET | Client Panel: Best Practices in Trading & Rebalancing | Geneva Cloud Delivery | Innovate. Empower. (Re)Balance. | Elements CRM Best Practices | Tamale Research Management: Looking to the Future |
| 4:25 – 5:00 PM ET | Networking | | | | |

# DAY 2 – Wednesday, September 15

| | AIS | Geneva | Black Diamond | Salentica | Other Solutions |
|---|---|---|---|---|---|
| 12:45 – 1:00 PM ET | Venue Open | | | | |
| 1:00 – 1:40 PM ET | Operational Alpha: Navigating the New Realities of End-to-End Propositions, Data Marketplaces and Ecosystem Effects. | | | | |
| 1:55 – 2:35 PM ET | An Overview of CFA Institute's Proposed ESG Disclosure Standard | Geneva Roadmap: An Inside Look | Black Diamond Presents: Platform Power Hour | How Wealth Managers Are Creating Rich-Experiences with CRM | Advent Data Solutions: The Data Evolution |
| 2:50 – 3:30 PM ET | New Innovations: Today, Tomorrow and 2025 | Live Q&A With Geneva Experts | Black Diamond Data: Behind the Numbers | Engage CRM Best Practices | Modernizing the Trust Company Client Experience |
| 3:45 – 4:25 PM ET | What to Consider When Selecting an Outsourcing Provider | Client Panel: Building a Culture of Compliance | Insurance: Strengthening the Financial Planning Conversation | Product Roadmaps & Services Update | Streamlining Private Loan Risk |
| 4:25 – 5:00 PM ET | Networking | | | | |

# Session Details – All SS&C Advent Solutions

**Venue Open** | BOTH DAYS, 12:45 – 5:00 PM ET

Network with other attendees and stop by the Solution Showcase!

**SS&C Advent Leadership Insights for a Changing World** | DAY 1, 1:00 – 1:40 PM ET

Join Karen Geiger and Steve Leivent as they kick off Advent Engage 2021 sharing an insightful perspective on leading through change as brands and products transition through the ever changing world. The session will also cover the future of Advent and product focus areas over the coming year.

**Operational Alpha: Navigating the New Realities of End-to-End Propositions, Data Marketplaces and Ecosystem Effects** | DAY 2, 1:00 – 1:40 PM ET

Investment managers and asset owners are now directing their preferences towards converged operational models for IT/operations, underpinned by multiasset solutions, more functional coverage, and/or greater outsourcing of non-core activities across the investment lifecycle. However, evolving towards a front-to-back model requires firms to rethink their target operating models from architecture, data, operations and governance perspectives. This session provides perspectives and pointers on how to navigate these changes.

# Session Details – AIS

**APX & Moxy: Today, Tomorrow and 2025** | DAY 1, 1:55 – 2:35 PM ET

Join our product managers for an interactive session discussing the award-winning Advent Investment Suite for investment management. Learn about exciting new features to improve your firm's productivity and review our current roadmap of upcoming enhancements. We encourage your feedback and participation for an interactive Q&A.

**Navigating the Competitive Landscape: A Technology Panel** | DAY 1, 2:50 – 3:30 PM ET

Hear from SS&C Advent's technology experts and your peers in this lively panel around all things tech. Topics will include but aren't limited to scalability and performance, integration and data access, and security and infrastructure.

**Client Panel: Best Practices in Trading & Rebalancing** | DAY 1, 3:45 – 4:25 PM ET

Join your peers and our Moxy & Genesis experts to hear how they are utilizing best practices to keep up with trading trends, portfolio management and industry challenges to build a more efficient practice from front to back office.

# Session Details – AIS continued

**An Overview of CFA Institute's Proposed ESG Disclosure Standard |** DAY 2, 1:55 – 2:35 PM ET

Recognizing the need for a global product-level ESG disclosure standard, CFA Institute introduced the ESG Disclosure Standards for Investment Products with the release of an exposure draft of the Standards in May 2021. With the final version of the Standards expected in November 2021, this session will highlight the requirements of the Standards and the benefits to asset managers and the investment management industry.

**New Innovations: Today, Tomorrow and 2025 |** DAY 2, 2:50 – 3:30 PM ET

Innovation in the technology space is accelerating every day, and we at SS&C Advent are always trying to think three steps ahead. Join us to hear what's next for the Genesis platform, and how we are working to drive industry trends while keeping client needs top of mind.

**What to Consider When Selecting an Outsourcing Provider |** DAY 2, 3:45 – 4:25 PM ET

Increasing operational efficiencies in a faster-paced world isn't always straightforward, but finding the right outsourcing partner can help. Join your peers and SS&C Advent's Al Castillo for an insightful discussion around outsourcing advantages, common misconceptions and lessons learned. Learn what to look for in the right outsourcing partner to meet your firm's unique demands - for today and tomorrow.

# Session Details – Geneva

**It's all about that Tech! |** DAY 1, 1:55 – 2:35 PM ET

Discover all things Geneva(R) technology including updates on the latest enhancements, as well as technologies and design concepts in consideration for our future roadmap. This is an opportunity for you to learn more about improvements to scalability and performance, integration and data access (including REST API, Change Analyzer, and Data Browser “2.0”), and enhancements around our security and infrastructure.

**What’s all the talk about Alternative Managed Services? |** DAY 1, 2:50 – 3:30 PM ET

Join our experts as they explore the co-sourcing model with Geneva(R) at the core that enables full data and reporting access, the benefits of reducing IT infrastructure and software upgrades, and how this approach will empower your employees by outsourcing time-intensive tasks, e.g., reconciliation, asset servicing, and file monitoring.

**Geneva Cloud Delivery |** DAY 1, 3:45 – 4:25 PM ET

The trend towards outsourcing and remote working have drastically accelerated in the past year. Geneva Cloud Delivery helps meet the demands of a changing workforce. Come learn more from our experts about our hosting capabilities for Geneva and complementary applications.

# Session Details – Geneva Continued

**Geneva Roadmap: An Inside Look** | DAY 2, 1:55 – 2:35 PM ET

Join our Solutions Management and Product Development team as they provide an inside look into key projects to look forward to this year, ideas we are considering, longer term problems we are solving, and how we are expanding our utilization of web technology to assist your audit and data access needs.

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

Hosted by the experts who know Geneva the best, this engaging forum is the perfect place to bring your questions and get answers on all things Geneva. Hear directly from the Product Development and Global Solutions Management teams.

**Client Panel: Building a Culture of Compliance** | DAY 2, 3:45 – 4:25 PM ET

A changing regulatory environment, increased investor scrutiny, and a list of internal compliance requirements can start adding up to be an operational nightmare. This panel discussion will explore the demands of today's climate and how firms can find ways to not only adhere to regulatory and investor requirements, but promote a culture of compliance without sacrificing speed-to-market.

# Session Details – Black Diamond

**Black Diamond: A True Financial Life Hub** | DAY 1, 1:55 – 2:35 PM ET

Today, advisors need to position themselves at the intersection of their clients' personal and financial lives and help them make the best of both, with thoughtful, informed, and compassionate coaching. As the heart of your business, Black Diamond frees you to support the many avenues of holistic wealth advice. In this session, product and service leaders will discuss industry trends, platform innovation, our unique service experience, upcoming enhancements, partnerships, and more.

**Elevating Client Relationships with Technology** | DAY 1, 2:50 – 3:30 PM ET

Black Diamond empowers you in a multitude of ways to engage with your clients every step of the way - setting goals, navigating major life events, making important decisions and more. Join us to learn more about new features in both Client View and the Client Experience portal and gain insight on what's to come.

**Innovate. Empower. (Re)Balance.** | DAY 1, 3:45 – 4:25 PM ET

Get an up-close look at the flexibility and power of the Black Diamond Rebalancer, preview new functionality and learn more about how you can improve your agility in today's market.

# Session Details – Black Diamond continued

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**Black Diamond Presents: Platform Power Hour | ** DAY 2, 1:55 – 2:35 PM ET

It's everything you wanted to know about Black Diamond and more! Join this entertaining session as a variety of product managers detail platform highlights, including what's new and what's next, as well as tips to maximize use.

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**Black Diamond Data: Behind the Numbers | ** DAY 2, 1:55 – 2:35 PM ET

Accurate and dynamic data allows you to operate efficiently and confidently. This session will discuss new Black Diamond aggregation sources as well as dive into audit tools, outbound data, and more.

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**Insurance: Strengthening the Financial Planning Conversation | ** DAY 2, 2:50 – 3:30 PM ET

With the Advent Insurance Marketplace Powered by DPL, your firm can easily discover, evaluate, implement, and report on insurance and annuities for your clients directly from Black Diamond.  Join us to learn how this integrated offering equips you with the resources, tools, and insights necessary to implement insurance as part of your clients' financial plans.

# Session Details – Salentica

**How Advisors Use CRM Manage Their Pipeline** | DAY 1, 1:55 – 2:35 PM ET

Being able to personalize customer relationships at scale can be your competitive advantage. Learn how to cultivate trusting relationships with new business opportunities from day 1, and build a transparent team approach to close more business.

**How Asset Managers Use CRM To Manage Their Distribution Channels** | DAY 1, 2:50 – 3:30 PM ET

Understand how a purpose-built CRM can help organize and track your distribution platforms, the relationships you've built, and the buying agreements you've put together.  Handling these critical data points seamlessly ensuring you have the complete picture and are able to close those open loops.

**Elements CRM Best Practices** | DAY 1, 3:45 – 4:25 PM ET

With proprietary features, available integration data, and tried and true CRM concepts Elements is a platform of possibility. Come see how our solutions experts use CRM solve the everyday and complex issues facing nearly every financial services firm.

# Session Details – Salentica Continued

**How Wealth Managers Are Creating Rich-Experiences CRM** | DAY 2, 1:55 – 2:35 PM ET

Learn how to create customer rich experiences to kick start your business transformation and exceed escalating customer expectations. Resulting in better service, better products, better experiences,  and better margin.

**Engage CRM Best Practices** | DAY 2, 2:50 – 3:30 PM ET

With proprietary features, available integration data, and tried and true CRM concepts Engage is a platform of possibility. Come see how our solutions experts use CRM solve the everyday and complex issues facing nearly every financial services firm.

**Product Roadmaps & Services Update** | DAY 2, 3:45 – 4:25 PM ET

We're continuously developing new capabilities to enable your digital transformation. Join leaders from our Development and Service teams for a glimpse into what will be made available in short and long-term. Hear how our Services team is re-designing the customer experience to best align with your business goals.

# Session Details – Other Solutions

**Client Portals: Empowering Around the Clock Engagement** | DAY 1, 1:55 – 2:35 PM ET

A high-quality, technology-powered client experience can go a long way to reinforce the reasons a client chooses to stay with your firm and recommend you to friends and family. In this session, you'll learn how SS&C solutions such as Black Diamond Link, Investrack, or Modestspark can fit into your existing system and enhance the value you provide to both your existing clients and future prospects.

**The Back-Office Evolution** | DAY 1, 2:50 – 3:30 PM ET

With not only the nature of financial services industry but also the way we work rapidly changing, it is more important than ever for firms to be intentional about how they approach and invest in their back office operations. Join the SS&C Advent Professional Services team as we talk about approaches for innovating within the back office, client success stories, and our approach for helping firms get back on track.

**Tamale Research Management: Looking to the Future** | DAY 1, 3:45 – 4:25 PM ET

Tamale RMS has delivered powerful new functionality with its 2021 releases optimizing the investment research process and saving analysts and portfolio manager's time whilst streamlining operations.  Join our product experts as they highlight key areas of delivery for 2021 including SS&C Intralinks folder mapping, CRM enhancements and workflow management.

# Session Details – Other Solutions Continued

**Advent Data Solutions: The Data Evolution** | DAY 2, 1:55 – 2:35 PM ET

Advent's Data Solutions suite has been helping clients with critical trade lifecycle data for almost 25 years. Learn how TransPort can help firms apply custom rules and logic to standard ACD files creating customized data for downstream systems including Axys, APX, and Geneva. We will also share updates on marketplace trends related to alternative data types such as Private Equity Funds and Cryptocurrency sources.

**Modernizing the Trust Company Client Experience** | DAY 2, 2:50 – 3:30 PM ET

The SS&C Trust Suite merges the power of industry leading trust offerings from SS&C Innovest and the Black Diamond® Wealth Platform. Join us to learn how these two powerhouses work together to deliver end-to-end trust-enabled wealth management capabilities.

**Streamlining Private Loan Risk** | DAY 2, 3:45 – 4:25 PM ET

As the private lending space expands, the array of acceptable collateral has evolved with it. Businesses have tried to keep up with what the competition deems satisfactory collateral, yet the technology for managing this has not. Join the discussion on this growing trend and learn how Advent(R) Syncova enables banks and private lenders to automate and standardize collateral and risk calculations across structured lending or trade finance portfolios, regardless of the mix of asset types pledged as collateral.

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.