Sunday, October 2

5:30 – 7:00 p.m.	Welcome Reception in the Exhibit Hall

Monday, October 3

7:00 – 8:00 a.m.	Breakfast in Exhibit Hall
8:00 – 9:15 a.m.	Opening Comments and Keynote: CEO and Founders: A Future View of the Financial Services Industry Frank Baker, Siris Co-Founder and Managing Partner, Collin Roche, GTCR Co-CEO and Managing Director, Bryan Corbett, Managed Funds Association President and SS&C Chairman and CEO, Bill Stone
9:15 a.m. - 12:25 p.m. & 1:30-5:00 p.m.	Labs Open

Time	Asset Management	Banking	Health	Hedge	Insurance	Intelligent Automation	Private Markets	Retirement	Wealth Management
9:30 – 10:15 a.m.	Harnessing Innovation: Powering the Future in Asset Management Growth	Effective Digitization of the Complete Credit Lifecycle for Better Business Decisions	Welcome to SS&C Deliver: Evolution of the Health Industry and SS&C Health	SS&C Expert Panel: Future Trends in Hedge Fund Technology and Services	The Important - and Changing - Role of Insurance Companies in Commercial Real Estate	Finding an Automation Solution: Why RPA & BPM Must Work Together	Current and Future State: Private Markets Industry	Lifetime Income: Managing Decumulation Strategies	Standing Out from the Crowd: Successful Wealth Managers of the Future
10:15 – 10:45 a.m.	Networking Break in the Exhibit Hall								

Time	Asset Management	Banking	Health	Hedge	Insurance	Intelligent Automation	Private Markets	Retirement	Wealth Management
10:45 – 11:30 a.m.	Reimagining the Future of Investment Operations	CECL on the Eve of Adoption (for 2023 Filers)	The Future of Healthcare Coordination Starts With Interoperability	SS&C Enterprise for Hedge Funds: From Front-to-Back and Beyond	Maximizing the Deal: Getting the Most out of Private Equity and Life Insurance M&A Transactions	Modernizing Legacy Financial Services Technology Systems with Intelligent Automation	Insights from our Limited Partnership Survey	The State of Retirement: 2025 and Beyond	How To Empower Advisors and Enhance the Advisor-Client Relationship Through Education
11:40 a.m. – 12:25 p.m.	Going Beyond Traditional TA Solutions and Services. Are You Missing Out?	Agency and Non Agency Loan Servicers Best Practices	Deriving Value from Clinical Data	Developing a Best Practices Strategy to Navigate the Risk Analytics	Insurance Company Commercial Real Estate Loan Servicing	Using Citizen Development to Improve Customer Experience	Private Equity M&A Outlook	Participant Experience Tools: Improving Adoption to	How Wealth Managers are Identifying Customer Profitability and

				Regulatory Maze for Hedge Funds	and Accounting Best Practices			Make Your Investment Count	Assigning Service Levels
12:25 – 1:30 p.m.	Lunch								

Time	Feature Session	Feature Session	Feature Session
1:30 – 2:15 p.m.	Workplace Mental Health: An Urgent Business Imperative	Leading Tech: Insights from SS&C’s CTO	Operating in an Increasingly Volatile, Uncertain, Complex and Ambiguous World

Time	Asset Management	Banking	Health	Hedge	Insurance	Intelligent Automation	Private Markets	Retirement	Wealth Management
2:25 – 3:10 p.m.	Interval Alts Turnkey Plus: Interval Funds Made Easy for Asset Managers	Supporting the Loan Lifecycle from Application to Payoff	Health in the Time of Value-Based Care	Geneva Roadmap: An Inside Look	Where Does The Data Go? Meeting New Demands From Insurance Regulators	Driving the Future of Operations with Workforce Intelligence: The Unified Workforce	Data Transformation: Using Technology to Streamline Investor Reporting and Enhance Transparency	Closing the Retirement Gap in the US Retirement Market	Advantages of TAMP Solutions for Your Wealth Business
3:10 – 3:40 p.m.	Networking Break in the Exhibit Hall								

Time	Asset Management	Banking	Health	Hedge	Insurance	Intelligent Automation	Private Markets	Retirement	Wealth Management
3:40 – 4:25 p.m.	Why Microservices Matter and How They Can Transform Your Business	CECL Adoption is Complete – Now What? Leveraging CECL to Inform Business Decisions	Harmonizing Payer and Provider Management Experience	Hedge Fund and Asset Manager Peer-to-Peer Roundtable Discussions	Rethinking Document Management in Light of the New Portfolio Mix	Bridging the Digital Divide with Intelligent Document Processing	Democratization of Private Markets — Credit, Private Equity and Real Estate	Leveling the Playing Field for the LGBTQ+ Community	Automating the Client Acquisition Process for Wealth Managers
4:35– 5:20 p.m.	Portfolio Customization at Scale: Making it Possible with Technology	Intelligent Automation Maturity in Financial Services: Is it Time to Level Up?	In with the New: How the Future of Healthcare Relies on Harmonizing Payers and Providers	Flexible Operating Models for Scalable Growth	Intelligent Automation Maturity in Insurance: Is it Time to Level Up?	Success in Financial Services: How Blue Prism Delivers Growth and Profitability Like Never Before	Standing Out in a Crowded Field of Private Funds	From TikTok to AARP: Meeting the Financial Wellness Needs of the Multigenerational Participant	Innovating for the Next Generation of Wealth Creators
6:00 - 7:00 p.m.	Networking Reception in the Exhibit Hall								

7:00 – 9:00 p.m.	Opening Night Event at Hotel – Deliver Street Party

Tuesday, October 4

7:00 – 8:00 a.m.	Breakfast in Exhibit Hall
8:00 – 9:00 a.m.	**Keynote: Kevin O'Leary – Renowned Investor on ABC's Shark Tank and Founder and Chairman, O'Shares Investment Index Strategies**
9:00 a.m. – 12:05 p.m. and 1:15 – 3:25 p.m.	Labs Open

Time	Asset Management	Banking	Health	Hedge	Insurance	Intelligent Automation	Private Markets	Retirement	Wealth Management
9:10 – 9:55 a.m.	Building Winning Digital Customer Experiences: Lessons and Insights	Diversifying Your Portfolio – What Does This Mean for CECL?	The Next Frontiers in Healthcare	Archegos Capital Management Collapse: What Happened and its Impact on Hedge Funds and Prime Brokers	The Pitfalls of Excess: Managing Excess Capital in a Volatile Interest Rate Environment	Don't Automate It All! What You Need to Know About Choosing Processes to Automate Wisely	The Impact of Rising Interest Rates on Private Market Investments	Tech Forward: Disruptors in the Retirement Services Space	Advances in RegTech in Wealth Management: Managing compliance Mandates

9:55 – 10:25 a.m.	Networking Break in the Exhibit Hall

Time	Asset Management	Banking	Health	Hedge	Insurance	Intelligent Automation	Private Markets	Retirement	Wealth Management
10:25 – 11:10 a.m.	For Asset Managers, Gaining a Competitive Edge with ESG Investing	Timely Balance Sheet Risk Management: Linking Financial & Credit Risks During Extreme Volatility	The Promise of Digital Therapeutics	Leveling Up Your Front Office	Lots to Report: How to Design a Reporting Strategy for Your Many Stakeholders	Realizing the Promise of Digital Transformation with Intelligent Automation	Private Equity Investor Expectations in a Post-Pandemic Environment	The Future of Retirement Communications	ESG Investing for the Wealth Industry
11:20 a.m. – 12:05 p.m.	SEC's Rules and Regulation Changes for 2022 and 2023: Marketing rule and Form PF	Finance Transformations: How a Modern Finance Organization	Biosimilars: Shifting the Biologics Landscape	Peer Perspectives: 2023 Hedge Funds Forecast	Gaining a Competitive Advantage with a Complete and Flexible ERM Platform	From Legacy RPA to True Enterprise Intelligent Automation	Maximum Payoff: Innovations to Improve and Accelerate the Entire Loan Lifecycle	Keys to Maximizing Retirement Plan Health	The Looming Talent Shortage for Wealth Management Firms and How to Prepare

		Can Transform Your Business							
12:05 – 1:15 p.m.	Lunch								

Time	Feature Session	Feature Session	Feature Session	Feature Session
1:15 – 2:00 p.m.	Blue Prism — The People Puzzle: Why the Future of Work Relies More on People Than Product	When Health and Wealth Intersect	Crypto Adoption by Institutional Investors: Recent Advancements + Remaining Barriers	Cybersecurity and privacy live attack: Effectively handling operating complexity and ambiguity

Time	Asset Management	Banking	Health	Hedge	Insurance	Intelligent Automation	Private Markets	Retirement	Wealth Management
2:10 – 2:55 p.m.	Breaking Down Silos: A Case for Integrated Market and Credit Risk Analysis	How a Robust ESG Accounting Process Can Increase Profitability	Data Driven Outcomes: Getting to Tomorrow's Healthcare Today	The Quest for Transparency: The Evolution of Technology	Using Your Tools Smartly by Keeping Your People Smarter	Change the Way You Work Forever: Intelligent Automation Solutions to Transform Businesses Today	ESG and Sustainable Investing are Here to Stay. So How Do You Build a Successful ESG Strategy?	Impact on Retirement Due to Longevity, Changing US Demographics and the Future of Work	Insights on Providing Holistic Financial Advice in Wealth Management
2:55 – 3:25 p.m.	Networking Break in the Exhibit Hall								

Time	Asset Management	Banking	Health	Hedge	Insurance	Intelligent Automation	Private Markets	Retirement	Wealth Management
3:25 – 4:10 p.m.	Incorporating ESG into Performance Reporting for Alternative and Asset Managers	Riding the Regulatory Dragon: FRTB and Basel IV	Specialty Drug Management Strategies that Deliver Value	Demystifying Digital Assets for Hedge Funds and Institutional Investors	Portfolio Optimization in a Stochastic Simulation Framework: Improving Asset Allocation Strategies	Position Yourself for the Future: How to Create a Future-Proof Workforce That Delivers Real Results	Evolving Operational Support Needs For Global Private Markets Organizations	Regulatory Session: Potential Impacts of SECURE Act 2.0	Evolution of Products and Operations Support for Broker-Dealers Wealth Management Clients
4:20 – 5:05 p.m.	Outline of ETF Structures for Asset Managers		Intelligent Automation Maturity in Health: Is it Time to Level Up?	Ask the Experts: Live Q&A with Product Experts	The Managed Services Chronicles: Filling Expertise and Capacity Gaps in Unexpected Ways	A Roadmap for Success: Now, Next and Future	Evolution of Selling Through the RIA Channel	How to Solve the Paper Problem in Retirement Plans	Managing Asset Class Diversification in an ESG World
5:15 – 6:00 p.m.	SS&C Executive Panel Discussion: Delivering the Future								

7:30 p.m.	Transportation to the Closing Night Event
8:00 – 11:00 p.m.	Closing Night Event at Universal Studios™ – NYC and The Wizarding World of Harry Potter™ – Diagon Alley™

Session Descriptions

Monday, October 3

8:00 – 9:15 a.m. General Session

CEO and Founders: A Future View of the Financial Services Industry
Frank Baker, Siris Co-Founder and Managing Partner, Collin Roche, GTCR Co-CEO and Managing Director, Bryan Corbett, Managed Funds Association President and CEO sit for a conversation with SS&C Chairman and CEO, Bill Stone, to discuss the future of the financial services landscape. Covering market disruptors, the panel will discuss the future of investments and instruments, emerging and contracting geographic markets, managing risk in an increasingly volatile world – all while keeping an eye on delivering alpha.

9:30 – 10:15 a.m. Breakout Sessions

Harnessing Innovation: Powering the Future in Asset Management Growth
Track: Asset Management
Driving business success in today's increasingly dynamic environment requires firms to introduce innovative products and services with a compelling value proposition. But it doesn't stop there. Having the ability to scale distinctive and relevant innovations efficiently and effectively can truly set you apart. We'll share our perspective on the trends we're seeing in products and services, and what it means for the asset management industry.

Effective Digitization of the Complete Credit Lifecycle for Better Business Decisions
Track: Banking
Now more than ever, firms need support for the whole credit lifecycle—from origination and approval to monitoring and review, new business pricing, watchlists and default process monitors for better business decisions. Join this session to find out the latest innovations for streamlining the credit lifecycle.

Welcome to SS&C Deliver: Evolution of the Health Industry and SS&C Health
Track: Health
Imagine a health ecosystem that delivers simple, personalized care exactly when and how it is needed. One that puts members at the center and expands their access to integrated care services while focusing on outcomes-driven, holistic health. Join SS&C and our panel of health plan executives to learn how they are architecting that future today and partnering with SS&C Health to realize their vision. You'll learn their innovative approaches to creating this customer-centric, value-based health ecosystem leveraging SS&C's technology leadership to build the infrastructure, tools, platforms and analytics that will fuel it.

SS&C Expert Panel: Future Trends in Hedge Fund Technology and Services
Track: Hedge
Thousands of hedge fund managers rely on SS&C products and services spanning front-to-back office. In this panel, SS&C experts will discuss the macro trends we're seeing across our diverse client base, their current challenges, the opportunities for change that lie ahead, and their outlooks and predictions for the coming year. In a post-COVID "new normal," what are the biggest changes/key lessons learned with regard to tech investments and where hedge funds are spending their tech budgets. How is technology helping hedge funds adjust their investment strategies to current market opportunities/challenges?

The Important — and Changing — Role of Insurance Companies in Commercial Real Estate
Track: Insurance
Insurance investors have been major players in Commercial Real Estate (CRE) lending for decades. This is because of characteristics such as fixed-rate interest and ten-plus-year terms that benefit both sides. But, the pandemic, the threat of stagflation and emerging global pressures are creating an unusual set of market conditions for insurers for whom yield is still the top priority. How should insurers engage with this important asset class for maximum impact going forward? What changes do they need to make? Join us for a deep dive into the important—and changing—role of insurance investment in CRE.

Finding an Automation Solution: Why RPA & BPM Must Work Together
Track: Intelligent Automation
A lot of really smart teams have built great (and expensive) robotics process automation (RPA) solutions that have never made it into production. In this session, see how business process management works with RPA to avoid long and expensive multi-stage projects.

Current and Future State: Private Markets Industry
Track: Private Markets
Private markets continues to be one of the largest frontiers for managers seeking to find new sources of capital and investors seeking greater investment alpha. This executive panel will explore some of the key trends at the intersection of investors, managers and service providers, including capital raising, asset class expansion and technological advances.

Lifetime Income: Managing Decumulation Strategies
Track: Retirement
Historically, plans have been good at helping participants save for retirement, but not necessarily at managing decumulation. With rising concerns from Americans about outliving their retirement savings, the focus is now on servicing participants from accumulation to decumulation. Our panel of experts will help you understand the changing role of the recordkeeper, the importance of having a relationship with your participant and what products, technology and additional services are needed to satisfy your participants' needs and keep assets in your plan.

Standing Out from the Crowd: Successful Wealth Managers of the Future
Track: Wealth Management
In this overview of the success criteria for growth and differentiation in wealth management today and into the future, we'll explore the evolving practices that deliver change in driving value across the spectrum of accumulation and at retirement, and the outcomes that are expected by the new wealth creators. Innovations in technology are creating new ways of delivering financial planning, portfolio management, product suitability, advisory services, digitization and frictionless client journeys for each phase of life. As margin pressure persists within the industry, wealth managers are exploring ways that can create scale, increase efficiency and improve the end-to-end client service.

10:45 – 11:30 a.m. Breakout Sessions

Reimagining the Future of Investment Operations
Track: Asset Management
Investment operations are changing. New innovative technologies are helping drive change in business, such as moving to a single data model to remove the transition of data between systems, and providing the mobile tools people need to work in a new post-pandemic world. In this session, our experts will discuss these topics and share our insights on other future themes driving this change.

CECL on the Eve of Adoption (for 2023 Filers)
Track: Banking
As many financial institutions prepare to comply with CECL in 2023, there is much to be learned from those who have already adopted. CECL is not a prescriptive standard and many questions have arisen about navigating key decisions. Join our industry experts to learn more about how institutions have successfully implemented CECL, as well as lessons learned and nuances required for a smooth transition.

The Future of Healthcare Coordination Starts with Interoperability
Track: Health
In the age of data, interoperability becomes the crucial component that links patient, provider and plan to give all stakeholders a robust view of the patient's care and health. Achieving and maintaining interoperability, however, presents enormous challenges that require healthcare organizations to transform. Join this panel to review the trajectory of interoperability and the trials, tribulations and benefits of the process.

SS&C Enterprise for Hedge Funds: From Front-to-Back and Beyond
Track: Hedge
Hedge fund managers need a high level of service and technology to allow them to rise above the competition and generate alpha for their investors. SS&C's enterprise solution for hedge funds provides a complete set of front-to-back office capabilities designed to help managers adapt and grow as their needs evolve. Attend this session to learn more about how SS&C helps fund managers streamline operations, shrink their IT footprint, gain agility and scalability, and compete more effectively.

Maximizing the Deal: Getting the Most out of Private Equity and Life Insurance M&A Transactions
Track: Insurance
Strong M&A activity in the insurance sector continues as we move through 2022—although the reasons for it and the strategies that make it worthwhile are still evolving. Join the discussion as experts from the insurance investment world and private equity explore the "how" and "why" behind M&A success, for parties interested in learning more about how this tactic can rebalance their portfolios.

Modernizing Legacy Financial Services Technology Systems with Intelligent Automation
Track: Intelligent Automation
The financial services industry was one of the first to begin the widespread adoption of computing for back office and financial transaction processing, but the promise of that innovation hasn't necessarily taken hold as a long-term solution. In this session, see how the intersection of people, processes and technology platforms is the pathway to modernization and both short- and long-term success.

Insights from Our Limited Partnership Survey
Track: Private Markets
Each year SS&C Intralinks, in association with Private Equity Wire, polls limited partners worldwide for an insider's view of their sentiments toward their current funds, how they select general partners, and allocation plans for the coming 12 months. Join us for key findings on market trends and exclusive insights into LP sentiments on preferred asset classes, fund transparency, reporting and ESG expectations, GP's technology capabilities, asset allocation trends, macro and sector outlooks.

The State of Retirement: 2025 and Beyond
Track: Retirement
State of the Union of Retirement: Hear from industry leaders on current retirement trends and what recordkeepers can expect going forward in the changing retirement landscape.

How to Empower Advisors and Enhance the Advisor-Client Relationship Through Education
Track: Wealth Management
This session explores how to power client relationships as well as the careers of advisors through state-of-the-art education. Client case studies will be shared to illustrate how a variety of firms have successfully rolled out programs both internally and externally. Discover how firms are implementing advisor training and continuing education to elevate the advisor experience through robust online curriculums, programs with CPE credits as well as on-demand microlearning covering hot topics. Learn more about how you can make resources available to clients, whether directly via an advisor or through a personalized financial wellness portal.

11:40 a.m. – 12:25 p.m. Breakout Sessions

Going Beyond Traditional TA Solutions and Services. Are You Missing Out?
Track: Asset Management
This session will explore how today's asset managers are incorporating products and solutions outside the traditional transfer agent space to drive greater growth and efficiencies.

Agency and Non-Agency Loan Servicers Best Practices
Track: Banking
Agency and non-agency loan servicers will engage in a discussion of best practices when using SS&C's proprietary loan servicing software Precision LM. The topics of the session will be based on pre-session surveys with agency and non-agency loan servicers with respect to optimizing the effectiveness of Precision LM in their daily activities.

Deriving Value from Clinical Data
Track: Health
Through industry efforts to encourage increased access to, and use of, electronic health data across the entire continuum of care, the industry is making clinical data more available for quality reporting. Organizations will need to make investments in data governance, skills and identity to effectively utilize these new data sources.

Developing a Best Practices Strategy to Navigate the Risk Analytics Regulatory Maze for Hedge Funds
Track: Hedge
Hedge funds require risk analytics and reporting for a variety of audiences: Portfolio managers, risk officers, fund investors, and regulators. Navigating business requirements span across point-of-trade decision-making all the way up to the enterprise-wide analytics that support the comprehensive reporting needed by Form PF, AIFMD and the Open Protocol. This session will help untangle the complexities and will provide best practices on a clear path forward.

Insurance Company Commercial Real Estate Loan Servicing and Accounting Best Practices
Track: Insurance
Panelists from insurance companies will engage in a discussion of best practices when using SS&C's proprietary commercial real estate loan (CRE) servicing software Precision LM. The topics of the session will be based on pre-session surveys with insurance companies with respect to optimizing the effectiveness of Precision LM in their daily activities.

Using Citizen Development to Improve Customer Experience
Track: Intelligent Automation
To compete, companies need to create modern digital experiences for customers, but there aren't enough software developers to meet the demand. In this session, we'll explore how companies can embrace citizen development as a means to improve digital customer experiences, how low- and no-code technologies can expand development capacity by 10x, and how to best govern citizen development to mitigate risk without stifling innovation and speed.

Private Equity M&A Outlook
Track: Private Markets
With a record-hot M&A market in 2021, many expect the trend to continue, but how long will the bullish run last? With a record amount of dry powder yet to be deployed, private equity firms are facing fierce competition in the buyout market. Will economic and geopolitical pressures weigh on M&A activity? How has inflation pressure affected the industry? How are record-high valuations affecting deal flow? In this session, our experts examine current trends in M&A, favored industries, due diligence and risk mitigation, the importance of ESG and technology, and many other relevant topics.

Participant Experience Tools: Improving Adoption to Make Your Investment Count
Track: Retirement
Today's participants are demanding a more personalized digital experience, and these demands are driving the need to establish a better relationship with your participant. Join our discussion on how to successfully implement plan and investment tools, analyze results to improve participant adoption and ensure return on your investment.

How Wealth Managers are Identifying Customer Profitability and Assigning Service Levels
Track: Wealth Management
Customer profitability analyses are detailed, labor-intensive and difficult to implement. However, there are some metrics that can give you a rough, baseline picture of customer profitability. Because your biggest customers may not necessarily be your best customers. Learn to identify your profitable (and unprofitable) clients and use this segmentation to distinguish service levels and build automated engagement schedules for each tier of client. Focus on growing sales with your most profitable customers and finding ways to elevate less profitable ones.

1:30 – 2:15 p.m. – Feature Sessions

Workplace Mental Health: An Urgent Business Imperative

Track: All Audiences

Current world events have taken a toll on the mental well-being of individuals. Employees, especially Millennials and GenZ, are citing mental health as the primary reason for leaving their jobs. Mental health challenges are impacting all organizational levels, with depression being the number one benefit cost driver. In this session, we'll discuss epidemiological research and workplace case studies exploring the causes and consequences of mental disorders impacting employees and their families, identifying employees at risk and developing mental health services interventions, investing in a workplace culture of mental wellness, building mental wellness and resiliency in our next generation of workers.

Leading Tech | Insights from SS&C's CTO

Track: All Audiences

SS&C's chief technology officer, Anthony Caiafa will share SS&C's strategic views on balancing innovative technology solutions while meeting regulatory, risk and client demands. Anthony will also share his bold views on the open finance movement and the leadership lessons he continues to learn along the way.

Operating in an Increasingly Volatile, Uncertain, Complex and Ambiguous World

Track: All Audiences

Drawing on the expertise of diverse sectors—commercial, government, academia, and military, our panel of leaders will provoke new thinking around emerging, monumental risks. These risks include climate change/environmental damage, geo-political military confrontation, the erosion of international rules-based norms, worsening macroeconomic trends, natural resource shortages, infectious diseases, and many others. This team of experts will broaden your point of view on risk and awaken new considerations for strategic planning and management.

- *Moderator: Blair S. Williams, Ph.D., Managing Director, Risk and Technology Services*
- *Brigadier General Stephanie Ahern, U.S. Army, Director of Concepts, Futures and Concepts Center, U.S. Army Futures Command*
- *Jillien Flores, EVP and Managing Director, Head of Global Government Affairs, Managed Funds Association*
- *Timothy Kropp, Chief Information Security Officer, SS&C Technologies*

2:25 – 3:10 p.m. – Breakout Sessions

Interval Alts Turnkey Plus: Interval Funds Made Easy for Asset Managers

Track: Asset Management

Asset managers are seeking solutions to quickly launch interval funds and engage distribution partners to initiate capital raising activities and technology to address industry-unique requirements within a scalable, efficient model. Traditional turnkey platforms are one solution, but there is a tradeoff. In exchange for greater efficiency and convenience, asset managers must share a platform with a number of unaffiliated funds, lessening control and increasing reputational risk. We will share examples of how our Turnkey Plus solution enables a quick, efficient fund launch, while providing greater control of the product and reducing reputational risk.

Supporting the Loan Lifecycle from Application to Payoff
Track: Banking
Learn how to support the commercial loan lifecycle through application, pipeline, closing, servicing, covenant tracking, accounting and payoff. Straight-through loan-level data processing with single-entry to create the single authoritative truth of data for books and records with borrower and lender web portal access.

Health in the Time of Value-Based Care
Track: Health
Delivering valuable healthcare today centers on best patient outcomes at the lowest possible cost to patients and the system. Translating outcomes to meaningful care decisions has become a key to driving to the most cost-effective treatments. As more health organizations focus on value-based contracting to align actual outcomes to the finance of care, they must navigate the intricacies involved to get there. Join in the conversation and learn how many are solving these challenges.

Geneva Roadmap: An Inside Look
Track: Hedge
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.

Where Does The Data Go? Meeting New Demands From Insurance Regulators
Track: Insurance
The NAIC has made many changes in how investments are categorized and rated over the past two years. This session focuses on highlights of the upcoming changes and exploring how the data is used by regulators to analyze concentrations, risk and to calculate RBC.

Driving the Future of Operations with Workforce Intelligence — The Unified Workforce
Track: Intelligent Automation
Intelligent automation enables AI-fueled digital workers, people and systems to work together seamlessly as a unified workforce. In this session, learn how this unification can enable your people to focus on the things they do best—being creative, innovative and productive—all while enabling you to better serve your customers and meet your critical business goals.

Data Transformation: Using Technology to Streamline Investor Reporting and Enhance Transparency
Track: Private Markets
Alternatives continue to be a desirable asset class for institutional investors, but, as investors' appetite has grown, so have the challenges of managing complex reporting processes. LPs are looking for more in depth investment data, better transparency and faster communications from GPs. In this session, we'll explore the evolution of data and reporting in the private equity industry and how technology and standards can deepen GP/LP relationships. Topics include how LPs' demand for data has shifted in recent years, how standards of reporting have improved across the industry, and how technology can be leveraged to manage the overwhelming data flow.

Closing the Retirement Gap in the US Retirement Market
Track: Retirement
Discussion on how the retirement industry, including legislators, regulators and employers, are working together to close the estimated $4 trillion retirement gap.

Advantages of TAMP Solutions for Your Wealth Business
Track: Wealth Management
Explore with us the opportunity to use SS&C TAMP services as a way to extend your client offering and as a distribution venue for your investment research. The SS&C team will review the concepts related to front-to-back servicing along with product definition and management.

3:40 – 4:25 p.m. – Breakout Sessions

Why Microservices Matter and How They can Transform Your Business
Track: Asset Management
Hear our experts discuss the five ways a Microservice Architecture will benefit your Investment Operations. Learn how you can leverage a microservice architecture to reduce your cost, seamlessly integrate all your solutions, and dramatically increase your business agility.

CECL Adoption is Complete — Now What? Leveraging CECL to Inform Business Decisions
Track: Banking
With CECL adoption complete for 2020 filers, banks can now turn to enhancing and improving their business and risk management processes. This session will explore how clean data, improved models and more effective forecasting that banks have gained as a result of CECL can allow banks to implement more robust stress testing, leverage information to better price loans and allow for true business insights.

Harmonizing Payer and Provider Management Experience
Track: Health
The future of payer and provider management experience encompasses improved intake leading to one source of truth for benefits and formulary information, actionable data and analytics, improved data connectivity, and improved member experience via digital interfaces to their data and healthcare offerings. To get there, foundational claims processing systems must be revolutionized to focus on transparency as healthcare systems become increasingly interoperable, interconnected and complex. Join us to get a glimpse of next-generation health tech innovations.

Hedge Fund and Asset Manager Peer-to-Peer Roundtable Discussions
Track: Hedge
Some of the most valuable takeaways from industry conferences come from your fellow industry peers! Join the roundtable discussions to network with your peers and discuss best practices and share solutions to common challenges.

Rethinking Document Management in Light of the New Portfolio Mix
Track: Insurance
Managing the documentation for today's insurance portfolio can be a herculean feat. You may be dealing with credit, debt, commercial mortgages and bank loans for various investment types. Adding to an already heavy lift, you have documents coming at you from property managers, partnerships, loan correspondents, agent banks and more. Join us as we discuss modern strategies and tools for document management, and learn how the information and insights you need to review and reconcile can be right at your fingertips.

Bridging the Digital Divide with Intelligent Document Processing
Track: Intelligent Automation
Artificial Intelligence has stepped up to the front line of real-world problem solving and business transformation—with Intelligent Document Processing (IDP) becoming a vital component in the global effort to drive intelligent automation into corporations worldwide. In this session, see why IDP is one of the fastest, easiest, and most effective paths to automation and can provide businesses with 98%+ speed and accuracy and with near real-time turnaround times while serving as a vital link between input systems like the mailroom and digital portals, and downstream CRMs, enterprise content management systems and BPM engines.

Democratization of Private Markets: Credit, Private Equity and Real Estate
Track: Private Markets
The success and resilience of private markets investing has created a growing desire for firms to enter the retail space to find ways of opening valuable investments to individual investors. Key growth assets like credit, PE and real estate are already taking center stage. How are private markets investors entering this new territory? Are the distribution channels the same and what operational complexities can be anticipated? What are the roadblocks and concerns for regulators?

Leveling the Playing Field for the LGBTQ+ Community
Track: Retirement
Learn why the retirement plan industry needs to better consider the unique needs of the LGBTQIA+ community to not only help achieve greater successful retirement outcomes as plan participants, but also to make our industry more welcoming and inclusive for LGBTQIA+ employees.

Automating the Client Acquisition Process for Wealth Managers
Track: Wealth Management
This session will showcase how to automate the lifecycle of a new account using SS&C tools. From prospect (CRM) to account opening (via Chorus tools) to account establishment and funding (InnoTrust) to end-user experience (Black Diamond), we will walk you through how to better streamline this fundamental process.

4:35– 5:20 p.m. – Breakout Sessions

Portfolio Customization at Scale: Making it Possible with Technology
Track: Asset Management
Facing increased pressure to outperform the market, stem outflows and rationalize fees, asset and wealth managers are turning to new strategies to compete in today's hypercompetitive environment. This is an opportunity to lead the conversation around diversification into more specialized opportunities, and then deliver on the promise of personalization. To make this practice scalable, managers need portfolio construction and rebalancing tools that bring speed and efficiency to the process of security selection and portfolio modeling, largely through automation. Join our panel of portfolio managers and technologists to learn how to leverage technology solutions to deliver portfolio customization at scale.

Intelligent Automation Maturity in Financial Services: Is it Time to Level Up?
Track: Banking
Advanced intelligent automation capabilities are a must-have for all companies these days. But we've found most firms only achieve moderate automation before they plateau. In this session, learn how to identify and assess the current state of automation within your organization and create a roadmap for understanding how to fully leverage emerging technologies and support continual innovation with a focus on goals, staffing models, centers of excellence, talent and change management, scope of automation, depth of automation and business adoption.

In with the New: How the Future of Healthcare Relies on Harmonizing Payers and Providers
Track: Health
The pinnacle in today's healthcare organization is a combined view for payers and providers helping patients on their medical journeys. While past myriad approaches haven't worked, innovative organizations now have a digital labor operating model, laying foundations to meet challenges quickly, robustly, in an auditable manner and at scale. Building on the prior session, this discussion explores how payers and providers can "harmonize" their interoperability for a smoother integration that isn't technology dependent. The use of digital labor will greatly improve the patient experience by helping eliminate friction, provide a timeline of treatment, and show its economic impact to patient's bank accounts.

Flexible Operating Models for Scalable Growth
Track: Hedge
Expanding into new markets and asset classes can be cause for a shift in thinking operationally. At the very least, it often triggers an examination of the current operating models and technologies used to support internal processes and deliver client experiences. Hear why flexibility—to scale up or down, insource or outsource, move into new markets, or add capabilities all via a single partner—continues to be an often overlooked characteristic in a relationship between a fund or Asset Manager and it's service provider.

Intelligent Automation Maturity in Insurance: Is it Time to Level Up?
Track: Insurance
Advanced intelligent automation capabilities are a must-have for all companies these days. But we've found most firms only achieve moderate automation before they plateau. In this session, learn how to identify and assess the current state of automation within your organization and create a roadmap for understanding how to fully leverage emerging technologies and support continual innovation with a focus on goals, staffing models, centers of excellence, talent and change management, scope of automation, depth of automation and business adoption.

Success in Financial Services: How Blue Prism Delivers Growth and Profitability Like Never Before
Track: Intelligent Automation
With operating costs at record levels, growing regulatory burden and customers demanding more personalized value-added services, the industry is at a crossroads. Many organizations are slow to move to digital and still dependent on paper-based manual processes. The industry needs to transform at speed, without driving up costs, and focus people on customer service. In this session, we will outline how to deploy intelligent automation to build and execute an efficient digital-first operating model. Whether it's customer onboarding, compliance checking or financial reporting, we'll show you how our customers have successfully adopted our platform to deliver improved business value.

Standing Out in a Crowded Field of Private Funds
Track: Private Markets
With private markets attracting larger amounts of capital and gaining greater influence in the global financial system, regulators have taken notice. Private equity firms adapted to a changing environment and elevated their operational standards, particularly with complex fee terms and return calculations that present substantial operational issues. Accurately allocating profits, losses, expenses and tax impacts among every investor over the lifetime of a fund entails specialized expertise and technology, from deal management to portfolio and investor accounting and reporting. In this session, learn how operational expertise and technology infrastructure can help firms capitalize on investors' growing appetite for private equity.

From TikTok to AARP: Meeting the Financial Wellness Needs of the Multigenerational Participant
Track: Retirement
Evolving plan design features and communication can help you meet your multi-generational participants' near-term needs—such as student debt—as well as long-term retirement goals.

Innovating for the Next Generation of Wealth Creators
Track: Wealth Management
Transforming the customer experience for wealth creators of the future is down the centerline of wealth managers' strategic priorities. This session explores the near-future and showcases innovations now emerging in both advised and direct-to-consumer channels. It will examine new developments in the financial planning, on-boarding and digital servicing value chain for investors, using cutting-edge technology, and enabling the digital advice eco-system using AI and machine learning. It will also show how the use of "smart techniques" can be applied to create excellence in the advisor and customer experience as the world of e-finance rapidly continues to evolve.

Tuesday, October 4

8:00 – 9:00 a.m. General Session

Keynote: Kevin O'Leary – Investor on ABC's Shark Tank and Chairman, O'Shares Investments

9:10 – 9:55 a.m. – Breakout Sessions

Building Winning Digital Customer Experiences: Lessons and Insights
Track: Asset Management
When it comes to the customer experience, the goal should be to design better experiences that benefit your customers. But that's not all. Optimizing operations, retaining assets and attracting younger investors are also key objectives for many firms. In this session, our clients share what's driving their digital strategy, where they are in their journey, including the successes and challenges to date, and what's on the horizon.

Diversifying Your Portfolio – What Does This Mean for CECL?
Track: Banking
As many financial institutions prepare to comply with CECL in 2023, there is much to be learned from those who have already adopted. CECL is not a prescriptive standard and many questions have arisen about navigating key decisions. Join our industry experts to learn more about how institutions have successfully implemented CECL, lessons learned, and nuances required for a smooth transition.

The Next Frontiers in Healthcare
Track: Health
New legislation, programs and requirements related to PIE, digital therapeutics and other key areas continue to shape the trajectory of healthcare. Come see what these trends are and learn how they can impact you.

Archegos Capital Management Collapse: What Happened and its Impact on Hedge Funds and Prime Brokers

Track: Hedge

The aftermath of the Archegos Capital Management collapse last year sent shockwaves across Wall Street. Hedge funds and prime brokers alike are left wondering what happened, why it happened, and how firms can avoid a similar situation. To answer these questions, Paul Weiss conducted an independent investigation on behalf of Credit Suisse to address the bank's relationship with the family office. Join us for a fireside chat with the authors of the report as they discuss what they uncovered during their investigation and what this means for the future of hedge funds and prime brokerage.

The Pitfalls of Excess: Managing Excess Capital in a Volatile Interest Rate Environment

Track: Insurance

As the proverbial economic, social and global winds of change continue to shift, many insurers have been dealing with excess capital that needs to go to work in an environment that is, in many ways, unprecedented. Join us as we explore evolving approaches to alternatives investing and how modern data and technology can help drive today’s insurance asset allocation decisions.

Don’t Automate It All! What You Need to Know About Choosing Processes to Automate Wisely

Track: Intelligent Automation

While BPM and RPA have been available for years, automation has traditionally been a painstaking process. With growing demands for auditability, compliance, and operational resilience in regulated institutions, it takes time to manually map out processes. It can be tempting to try to automate everything, but is this the right approach? We explore how Process and Task Mining unearths what should be targeted for automation to drive optimal results such as 80% faster time to resolution for chargeback representment for a retail banking customer or for a pharmaceutical company, $8M in savings in 6 weeks via intelligent use of process automation.

The Impact of Rising Interest Rates on Private Market Investments

Track: Private Markets

Not only are interest rates rising, but global economic conditions are changing fast. As a result, private market deal terms may shift in complex and difficult-to-predict ways. A strategy that integrates aspects of investment management that often take place in silos can help protect yield. During this session, experts in risk, commercial real-estate portfolio management and accounting will discuss and demonstrate how a cross-functional, unified approach to investment strategy in a changing economic environment can help you achieve the yields you need.

Tech Forward: Disruptors in the Retirement Services Space

Track: Retirement

Similar to changes in the brokerage industry, how is technology disruption impacting the retirement industry? Explore integration, digital/robo advice, blockchain technologies.

Advances in RegTech in Wealth Management: Managing compliance Mandates
Track: Wealth Management
Recent guidance from FINRA requires advisors and broker-dealers to enhance their written supervisory procedures and policies. However, for many firms, relying on spreadsheets for account and trade analysis isn't enough, and sometimes, may only complicate the process. During this session, the panel will discuss how leveraging RegTech can help wealth management firms with monitoring of employee trades in accounts held away; managing outside business activities, gifts and entertainment, and political contribution and donation tracking; senior and vulnerable investor surveillance; leveraging CRM data for investment suitability and Reg BI; and anti-money laundering.

10:25 – 11:10 a.m. Breakout Sessions

For Asset Managers: Gaining a Competitive Edge with ESG Investing
Track: Asset Management
As investor preferences and approaches mature, investment managers need to consider Environmental, Social and Governance concerns in their portfolio management activities. Though the asset management industry has seen numerous ESG solutions come to market recently, few technology providers are able to seamlessly integrate ESG analytics into portfolio management tools. Doing this effectively will give managers access to actionable insights, the ability to align portfolios with investor values, and enhanced portfolio management processes. Join our panel of portfolio management and ESG experts as they discuss the importance of building ESG data and reporting into your investment process and client communications.

Timely Balance Sheet Risk Management: Linking Financial & Credit Risks During Extreme Volatility
Track: Banking
Moving out of the crises of the past couple of years, new challenges are being presented as inflation soars and interest rates rise. Imagine if risk and finance teams could work to align risk and credit simulation to allow for accurate and granular loan-level modeling of the balance sheet. Join this session to understand how SS&C can support closer alignment for more timely stress testing to plan for the risks of the future.

The Promise of Digital Therapeutics
Track: Health
Digital therapeutics have been evolving and growing, steadily gaining ground as research and clinical evidence support their use. Proposed legislation will impact the use of digital therapeutics while helping to build confidence in this emerging category of medicine. Where are digital therapeutics heading and how do we prepare for the coming changes as more digital therapeutics come to market? Join us to take a look in to this exciting new area of care.

Leveling Up Your Front Office
Track: Hedge
The cost of falling behind is higher than ever before. You differentiate your business in the front office, but are you prioritizing the front office in your tech decisions? Equipping your front-office teams with the right technology will help you stand out from the competition. In this session, SS&C's front-office experts will discuss modernizing your tech stack, key considerations for front-office technology decisions, and current trends in trading technology, AI, ML, and other next-generation tech.

Lots to Report: How to Design a Reporting Strategy for Your Many Stakeholders

Track: Insurance

Now more than ever, insurers face an intense reporting burden. Reporting properly can involve multiple constituents—from regulators to investors to boards—and diverse reporting requirements can range from real-time alerting and exceptions management, to customized reporting packages and bespoke risk and performance reporting. In this session, we will discuss modern approaches to designing and maintaining a reporting strategy so that you can streamline your reporting efforts, maximizing their value.

Realizing the Promise of Digital Transformation with Intelligent Automation

Track: Intelligent Automation

It wasn't long ago that the ambitions of firms implementing intelligent automation exceeded the capabilities of available technology. Fast forward to 2022, where intelligent automation is one of the fastest growing software categories. R&D, M&As and startup innovation in intelligent automation are providing organizations the opportunity to deliver on their business transformation initiatives like never before. In this session, learn about the latest innovations from SS&C Blue Prism to help you realize the power of transformation with intelligent automation.

Private Equity Investor Expectations in a Post-Pandemic Environment

Track: Private Markets

Private markets investing increased significantly before the pandemic. When coupled with trillions of dollars in government stimulus, private equity investing catapulted to all-time highs. While today's higher interest rates may slow some of these gains, private markets have proven to be a beacon in an ever-changing investment landscape. How are investors shifting investment priorities in a post-pandemic world? Do we see new asset classes emerging to fill the hunt for alpha? How will inflation impact decision-making and how are firms maintaining the existing value in their portfolios?

The Future of Retirement Communications

Track: Retirement

Learn how creating an interactive digital experience and moving from paper-based communication can improve adoption and enhance participant experience.

ESG Investing for the Wealth Industry

Track: Wealth Management

Join us for a discussion surrounding one of the hottest investment topics in recent years. Environmental, Social, and Governance investing is transforming the way people invest to align with their values, and at the same time, generating great alpha.

11:20 a.m. – 12:05 p.m. – Breakout Sessions

SEC's Rules and Regulation Changes for 2022 and 2023: Marketing rule and Form PF

Track: Asset Management

The SEC continues to propose changes that significantly impact the way managers need to report. In this session, we dive into the new requirements and discuss how firms can ensure compliance for the SEC's New Marketing rule and Form PF changes.

Finance Transformations: How a Modern Finance Organization Can Transform Your Business
Track: Banking
A modern subledger is vastly different than the subledgers of years past. While traditionally a subledger could help an institution have more granular data and easier GL reconciliation, the modern subledger can do much more. Subledgers can be the turning point for many organizations, helping them to meet several key strategic initiatives and drive the organization forward. But, while companies in other industries can easily use a pre-built, off-the-shelf subledger, banks simply cannot. Banks are too complex, and too tied to economic factors. This session will explore the benefits to be gained from a domain-aware subledger that facilitates real insight.

Biosimilars: Shifting the Biologics Landscape
Track: Health
As patents for blockbuster biologics begin to expire, biosimilars are finally starting to enter the market but some barriers to adoption remain. How do we use data to help build the real-world evidence supporting these new alternative drug treatments? What is the journey to build a body of evidence from real-world data for biosimilars? Join us for a review of biosimilars that have entered the market and data showcasing their impact.

Peer Perspectives: 2023 Hedge Funds Forecast
Track: Hedge
Hedge funds have proven they can deliver real value in the most challenging conditions. As the dust settles on this unprecedented period of change, where do you go from here? In this session, hear your peers' perspectives on the most critical issues they are facing, what's keeping them up at night, and their forecast for 2023.

Gaining a Competitive Advantage with a Complete and Flexible ERM Platform
Track: Insurance
As insurers have increased their exposures to alternative asset classes over the last decade and are now confronted with uncertain market conditions, the demand for enterprise-wide risk management capabilities is increasing dramatically. Algorithmics provides a unique end-to-end platform that allows clients to identify the sources of market and credit risks stemming from assets and liabilities, analyze portfolio and cash-flow projections under large scenario sets, run real-time what-if and stress test reports, and ultimately enable risk-aware business decision making. Join this session to learn how to improve your capital calculation, stress testing and ALM processes.

From Legacy RPA to True Enterprise Intelligent Automation
Track: Intelligent Automation
End-to-end automation requires a complete rethinking of business operations, so an open-mindedness to new technologies will be crucial for future success. In this session, we will learn the role of intelligent automation in improving the customer experience.

Maximum Payoff: Innovations to Improve and Accelerate the Entire Loan Lifecycle
Track: Private Markets
Loan issuers and investors face a hyper-competitive market and a complex regulatory landscape rife with new risks and consequences. It’s imperative to accelerate the loan lifecycle—from issuance and due diligence through post-close activities including servicing, accounting and investor reporting—while ensuring data privacy, securing the flow of sensitive information, and efficiently connecting stakeholders at any given moment. Join us to hear how loan issuers, investors and technology providers use innovations such as virtual data rooms, artificial intelligence, asset management and servicing platforms and more to transform and improve the entire loan lifecycle to safeguard deals and maximize long-term ROI.

Keys to Maximizing Retirement Plan Health
Track: Retirement
As plan sponsor or advisor, being aware of the engagement/usage of your retirement plan is vital to helping participants improve their financial wellbeing. Learn how to leverage technology to understand your overall plan health, create an effective communications strategy, benchmark data to compare compensation and participation to retain talent and more.

The Looming Talent Shortage for Wealth Management Firms and How to Prepare
Track: Wealth Management
Financial advisors are in the service industry. Today's advisors must position themselves at the intersection of their client's personal and financial life and help them make the best of both. However, as the industry moves forward, advisory firm owners are now staring down the "Great Resignation" and finding that attracting and retaining the best and brightest has emerged as a top management issue. In this session, our expert panel will discuss what is being done to help educate, attract, and keep new talent in the advisory profession.

1:15 – 2:00 p.m. – Feature Sessions

Blue Prism. The People Puzzle: Why the Future of Work Relies More on People Than Product
Track: All Audiences
We're heading for a workforce crisis in the next decade with shortfalls in the labor market and a shortfall in highly skilled workers. Find out how we *must* use technology alongside an entirely new mind set to combat the issues facing the future of work.

When Health and Wealth Intersect
Track: All Audiences
Everyone from consumers to advisors, wealth managers, fund sponsors, payers and providers are learning more about their health-enabled payment and investment products than ever before. All market participants need to determine where they bring value and how decisions impact one of the largest expenditure categories of the US economy. Join us as we discuss how some firms are meeting market demands and mapping a path forward. We will explore products and tools that enable the successful intersection of health and wealth.

Crypto Adoption by Institutional Investors: Recent Advancements + Remaining Barriers
Track: All Audiences
Join us to learn how both crypto natives and early adopters from traditional finance manage regulatory ambiguity, asset security, volatility, investor demand, and a general lack of technical expertise when investing in digital assets. This panel is targeted at firms who have begun the due diligence process but who have not yet fully launched their own digital asset fund. During this discussion, we will cover the following: What is their cost/benefit analysis? How are risks minimized? What risks are being born by the firm/fund/investors?

Cybersecurity and Privacy Live Attack: Effectively Handling Operating Complexity and Ambiguity
Track: All Audiences
SS&C operates a fleet of over 200,000 critical endpoint controls, consumes billions of signals, and effectively manages sensitive data. See and experience how our team of professionals has automated cybersecurity and privacy containment at scale. Experience a live robotic process automation demo for identifying, containing, and responding to Ransomware attacks. You will walk away with a first-hand operating experience and an understanding of privacy, regulatory, and incident materiality handling.

2:10 – 2:55 p.m. – Breakout Sessions

Breaking Down Silos: A Case for Integrated Market and Credit Risk Analysis
Track: Asset Management
Market and credit risk have traditionally been treated as independent. But this assumption is far from reality, as has been recently shown in the energy markets. This session will look at how the creditworthiness of institutions can be modeled and correlated with key market risk drivers.

How a Robust ESG Accounting Process Can Increase Profitability
Track: Banking
Studies show that institutions with a robust ESG process are more profitable...why is that? And how can a modern finance organization empowered with the right tools lead the way for your bank? Join our industry experts as we explore this topic.

Data-Driven Outcomes: Getting to Tomorrow's Healthcare Today
Track: Health
Data is an integral part of the healthcare system today. Ultimately data enhances the value and effectiveness of healthcare and ties together research with real-world experience and population analytics, for a positive impact on the overall health of members and client performance. Join us as we showcase how data analysis enables insights for success, such as identifying and targeting the best candidates for interventions, defining high performing networks and assessing population needs.

The Quest for Transparency: The Evolution of Technology
Track: Hedge
Funds who outsource their core services, like fund administration, are heavily reliant upon service providers to "do the right thing" and report the most accurate data possible with few checks and balances. What if there was a way for funds to visualize the status of daily processing? Would it increase efficiency? Hear from operations executives and SS&C technologists on how SS&C GoCentral uses artificial intelligence to pinpoint exceptions and deliver a 360-degree view across three information layers—summary, intelligence, and detail—to meet the needs of a rapidly evolving industry.

Using Your Tools Smartly by Keeping Your People Smarter
Track: Insurance
Even with the proliferation of tools to help with team collaboration from multiple locations, the number one tool to keep things running smoothly and your people sane is knowledge. This discussion highlights case studies of how your peers are renewing focus on investment, workflow and system knowledge to manage new dynamics.

Change the Way You Work Forever: Intelligent Automation Solutions to Transform Businesses Today
Track: Intelligent Automation
Imagine being able to harness the collaborative power of human and digital workers to transform outcomes and results in all areas of your organization. In this session, Blue Prism will bring the power of a truly unified workforce to life through a series of use cases, demonstrating how people and digital workers operate collaboratively and seamlessly, at speed, to deliver better business outcomes, engaged employees and memorable customer experiences.

ESG and Sustainable Investing are Here to Stay. So How Do You Build a Successful ESG Strategy?
Track: Private Markets
Not so long ago, investment managers considered ESG to be a niche part of the market that was seldom considered by mainstream investors and managers. That has clearly changed as both regulators and allocators have started to pay significant attention to this space. Most managers are now considering the potential impact of ESG factors on their portfolio in terms of both risks and opportunities. In this session, we'll discuss the ESG "state of the union," how it is impacting different market segments and what your peers are doing to balance stakeholder ESG concerns with more traditional concerns around risk returns.

Impact on Retirement Due to Longevity, Changing US Demographics and the Future of Work
Track: Retirement
In the United States, as many as half of today's five-year-olds can expect to live to the age of 100. How do firms/plans adapt to meet the retirement challenges that longevity brings and help participants plan for longer careers and longer lives?

Insights on Providing Holistic Financial Advice in Wealth Management
Track: Wealth Management
To have a comprehensive conversation with clients, advisors must have a complete picture of their financial lives, covering everything from investments to insurance and everything in between—including a client's values. Traditionally, digital financial planning tools assisted advisors as they helped paint a roadmap for clients, outlining the steps they needed to take to reach their goals. This session will delve into how today's financial tools allow advisors to serve clients in a meaningful and insightful way.

3:25 – 4:10 p.m. Breakout Sessions

Incorporating ESG into Performance Reporting for Alternative and Asset managers
Track: Asset Management
In this session, we will describe what is needed to accommodate fluid ESG data inputs and reporting outputs, and ways you can solve this challenge.

Riding the Regulatory Dragon: FRTB and Basel IV
Track: Banking
From the Fundamental Review of the Trading Book, through to SACCR and FRTB-CVA, and other Basel IV requirements, there is a suite of regulatory changes for banks to address that have significant impacts on risk systems and practices. This session reviews the latest regulatory compliance requirements as well as best practices and challenges on implementing them.

Specialty Drug Management Strategies that Deliver Value

Track: Health

The number of patients taking specialty medications is rising right along with associated costs. How can plans deliver quality care AND achieve positive financial outcomes (i.e., value) in this environment? We'll discuss emerging best practices in specialty drug management such as personalized medicine, utilization trends, specialized disease management techniques, and the "Specialty Centers of Excellence" model.

Demystifying Digital Assets for Hedge Funds and Institutional Investors

Track: Hedge

Cryptos and other digital assets were predicted to flourish in 2022 with institutional investors increasingly more willing to step into the fray. In light of the potential opportunity this poses for asset managers, the crypto landscape can still be a wild west. A panel of industry experts will discuss the current case for investing in digital assets, navigating the operational challenges in launching digital strategies, and technology considerations, as well as share their advice and insights for setting your fund up for success.

Portfolio Optimization in a Stochastic Simulation Framework: Improving Asset Allocation Strategies

Track: Insurance

Risk and investment managers seek to optimize portfolio returns under a set of constraints, such as limits on exposures, asset types and ESG scores. Insurers, in particular, need to test new investment strategies against their liability benchmarks using what-if and portfolio optimization capabilities. SS&C Algorithmics allows you to enhance the asset allocation process consistently with capital allocation and risk assessment policies. Join this session to learn how to design successful investment strategies using portfolio management best practices.

Position Yourself for the Future: How to Create a Future-Proof Workforce That Delivers Real Results

Track: Intelligent Automation

The pressures on today's businesses are huge. Everyone wants more, faster, and better than before! Staying ahead of your competitors is tough. And keeping customers and employees happy is tougher. Join Blue Prism to explore what it means to reimagine the way work is done, using an automation-first approach that supports a unified workforce of people and digital workers. Find out how to transform your productivity, business growth, market leadership and the experiences of your customers and employees.

Evolving Operational Support Needs For Global Private Markets Organizations

Track: Private Markets

Growing private markets firms continue to seek operational support for more than just traditional front and back-office needs. A layer of middle-office services continues to evolve in support of these businesses, supporting portfolio activities, treasury functions, and for firms expanding into new jurisdictions, the need for tracking and reporting in numerous locations, many of which they likely don't have a physical presence. During this session we will hear from large, global organizations, discussing business challenges and an evolving operational model, as well as SS&C experts focused specifically in these areas.

Regulatory Session: Potential Impacts of SECURE Act 2.0

Track: Retirement

Understand key provisions of SECURE Act 2.0 and what it means to your plan and your participants.

Evolution of Products and Operations Support for Broker-Dealers Wealth Management Clients
Track: Wealth Management
With the continued push for advisors to manage the full financial health of their clients, we'll explore trends we are seeing around savings for education, wellness and other products, including alternatives. We will discuss what these trends are, what movement is happening in the industry to support such trends, and what we are doing at SS&C to ensure our clients' needs are met for this evolving journey.

4:20 – 5:05 p.m. Breakout Sessions

Outline of ETF Structures for Asset Managers
Track: Asset Management
Facing outflows from mutual funds and separately managed accounts (SMAs) to exchange-traded funds (ETFs) due to lower fees, many portfolio managers are under the impression that they need to keep their "secret sauce" hidden. They seem to think that to enter the ETF race, they must launch a semi-transparent ETF, but do they really need to? An active transparent ETF may be a moruitable strategy, especially under 6c-11 and custom baskets. This panel will explore the right product wrapper for your strategy.

Intelligent Automation Maturity in Health: Is it Time to Level Up?
Track: Health
Advanced intelligent automation capabilities are a must-have for all companies these days. But we've found most firms only achieve moderate automation before they plateau. In this session, learn how to identify and assess the current state of automation within your organization and create a roadmap for understanding how to fully leverage emerging technologies and support continual innovation with a focus on goals, staffing models, centers of excellence, talent and change management, scope of automation, depth of automation and business adoption.

Ask the Experts: Live Q&A with Product Experts
Track: Hedge
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 product. Hear directly from the Product Development and Global Solutions Management teams on accounting, order and execution management, risk, performance, attribution and more.

The Managed Services Chronicles: Filling Expertise and Capacity Gaps in Unexpected Ways
Track: Insurance
We continue to see growth in managed services among insurance companies—not only in terms of numbers, but also in an expanding and sometimes surprising range of use cases. In this session, we will present three managed services "stories"—or cases, each about a client who utilized managed services in differing ways to achieve success that surpassed expectations.

A Roadmap for Success: Now, Next and Future
Track: Intelligent Automation
At SS&C Blue Prism, providing our customers with exceptional intelligent automation technologies is our top priority. Join this session to find out about all our forthcoming capabilities that can help you unlock even greater value from your Intelligent Automation initiatives, enabling you to drive your business forward from wherever you are today, and stay a step ahead in today's world of work.

Evolution of Selling Through the RIA Cannel

Track: Private Markets

Investors and advisors are continuing to seek uncorrelated assets to the traditional markets and looking to diversify their portfolios in staggering numbers. According to a recent Preqin report, alternative assets surged in 2021 to about $13 trillion, and the firm expects that to grow to $23 trillion by 2026. Hear from our panel of experts on the front lines addressing the industry challenges to meeting this growth.

How to Solve the Paper Problem in Retirement Plans

Track: Retirement

Some participants still love paper. Learn how to leverage technology to create an effective, cost-efficient plan to manage the paper problem while also creating an interactive digital experience.

Managing Asset Class Diversification in an ESG World

Track: Wealth Management

An emerging theme for wealth managers is achieving sustainable growth through the expansion of asset classes within funds or model portfolios—ensuring the performance stays in tune with the portfolio solution presented to the client by the DFM or advisor. Managing risk and driving returns across a diversified portfolio continues to be a priority; simultaneously, ESG is fast evolving and front office practices require screening and controls at the portfolio construction and re-balancing phases. We'll examine new techniques available to the front-office user community and cover the downstream changes to the operating model to future-proof managers throughout asset class diversification.

5:15 – 6:00 p.m. – Feature Session

SS&C Executive Panel Discussion: Delivering the Future

Track: All Audiences

At SS&C, we are champions of innovation and constantly raising the bar with our research and development. "Delivering the Future" will feature five of our business leaders discussing new ways we approach R&D throughout the company.