

Blue Vault Bowman Alts Summit 2020
Product Forum Agenda
Grand Ballroom II & III

Blue Vault Bowman Alts Summit 2020
AltsTech Forum Agenda
Buckhead Ballroom

Day: Tuesday, March 10, 2020 Time: Who:

Registration & Information desk	9:00 AM - 6:30 PM	
Lunch	11:45 AM - 12:50 PM	All
Welcome to the Summit	12:55 PM - 1:15 PM	All
Panel Discussion, "Alts Electronic Business: A Discussion About Today's Challenges"	1:15 PM - 2:00 PM	All
Moderator: Angie Fisher, CIM Group		
Panelists:		
Justin Fay, BNY Mellon Pershing		
Sara Murphy, AIX		
Mike Pagano, Avantax		
Cheryl Wheeler, SS&C ALPS		
Doug Buce, Boing Dynamics	2:00 PM - 2:10 PM	BDs/RIAs
ExchangeRight	2:10 PM - 2:30 PM	BDs/RIAs
Broker Dealer/RIA Discussion	2:30 PM - 2:35 PM	
Cottonwood	2:35 PM - 2:55 PM	BDs/RIAs
Broker Dealer/RIA Discussion	2:55 PM - 3:00 PM	
Networking Break	3:00 PM - 3:40 PM	All
Black Creek Group	3:40 PM - 4:00 PM	BDs/RIAs
Broker Dealer/RIA Discussion	4:00 PM - 4:05 PM	
Triton Pacific	4:05 PM - 4:25 PM	BDs/RIAs
Broker Dealer/RIA Discussion	4:25 PM - 4:30 PM	
Ashford Securities	4:30 PM - 4:50 PM	BDs/RIAs
Broker Dealer/RIA Discussion	4:50 PM - 4:55 PM	
Peachtree Hotel Group	4:55 PM - 5:15 PM	BDs/RIAs
Broker Dealer/RIA Discussion	5:15 PM - 5:20 PM	
Doug Buce, Boing Dynamics	5:20 PM - 5:30 PM	BDs/RIAs
Broker Dealer/RIA Meeting	5:30 PM - 5:50 PM	BDs/RIAs
Networking Reception	5:50 PM - 6:30 PM	All
Networking Dine-arounds	6:30 PM	

Wednesday, March 11, 2020

Registration & Information Desk	7:00 AM - 6:30 PM	
Networking Breakfast	7:00 AM - 8:00 AM	All
Doug Buce, Boing Dynamics	8:00 AM - 8:10 AM	BDs/RIAs
A Discussion with The Bowman Law Firm	8:10 AM - 8:40 AM	BDs/RIAs
Leitbox Portfolio Partners	8:40 AM - 9:00 AM	BDs/RIAs

Day: Time:

Registration & Information Desk	7:00 AM - 6:30 PM
Networking Breakfast	7:00 AM - 8:00 AM
Doug Buce, Boing Dynamics	8:20 AM - 8:30 AM
Panel Discussion: "Creating/Utilizing Tech to Support the Advisor"	8:30 AM - 9:20 AM
Moderator: Darren Whissen, Atomi Financial	
Panelists:	
Mindy Gayer, The Entrust Group	
Joel Hurst, Orion	
Mike Kell, AI Insight	
Kyle Van Pelt, SS&C ALPS	

Wednesday, March 11, 2020

Registration & Information Desk	7:00 AM - 6:30 PM
Networking Breakfast	7:00 AM - 8:00 AM
Doug Buce, Boing Dynamics	8:20 AM - 8:30 AM
Panel Discussion: "Creating/Utilizing Tech to Support the Advisor"	8:30 AM - 9:20 AM
Moderator: Darren Whissen, Atomi Financial	
Panelists:	
Mindy Gayer, The Entrust Group	
Joel Hurst, Orion	
Mike Kell, AI Insight	
Kyle Van Pelt, SS&C ALPS	

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Day:	Time:	Who:
CIM Group	9:05 AM - 9:30 AM	BDs/RIAs
Broker Dealer/RIA Discussion	9:30 AM - 9:35 AM	
Doug Buce, Boing Dynamics	9:35 AM - 9:40 AM	BDs/RIAs
Networking Break	9:40 AM - 10:25 AM	All
Bluerock Real Estate	10:25 AM - 10:45 AM	BDs/RIAs
Broker Dealer/RIA Discussion	10:45 AM - 10:50 AM	
Pacific Oak	10:50 AM - 11:10 AM	BDs/RIAs
Broker Dealer/RIA Discussion	11:10 AM - 11:15 AM	
Networking Break	11:15 AM - 11:30 AM	All
Carter Multifamily	11:30 AM - 11:50 AM	BDs/RIAs
Broker Dealer/RIA Discussion	11:50 AM - 11:55 AM	
Legendary Capital	11:55 AM - 12:15 PM	BDs/RIAs
Broker Dealer/RIA Discussion	12:15 PM - 12:20 PM	
Networking Lunch	12:20 PM - 1:20 PM	All
Round table Discussion	1:20 PM - 2:20 PM	Elite/VIP
Doug Buce, Boing Dynamics	2:20 PM - 2:30 PM	BDs/RIAs
Panel Discussion: "Alts Electronic Business: A Discussion About Today's Solutions"	2:30 PM - 3:15 PM	All
Moderator: Richard Thoeny, Docupace		
Panelists:		
Sonny Cabral, DTCC		
Michael Page, Riskalyze		
Bill Robbins, WealthForge		
Robert Worthington, iCapital		
Networking Break	3:15 PM - 3:55 PM	All
Doug Buce, Boing Dynamics	3:55 PM - 4:00 PM	BDs/RIAs
Inland	4:00 PM - 4:20 PM	BDs/RIAs
Broker Dealer/RIA Discussion	4:20 PM - 4:25 PM	
NexPoint	4:25 PM - 4:45 PM	BDs/RIAs
Broker Dealer/RIA Discussion	4:45 PM - 4:50 PM	
Owl Rock	4:50 PM - 5:10 PM	BDs/RIAs
Broker Dealer/RIA Discussion	5:10 PM - 5:15 PM	
Doug Buce, Boing Dynamics	5:15 PM - 5:25 PM	BDs/RIAs
Broker Dealer/RIA Meeting	5:25 PM - 5:55 PM	
Evening Break	5:55 PM - 6:05 PM	
Networking Reception	6:05 PM - 6:35 PM	All
Networking Dine-arounds	6:35 PM	

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AltsTech Forum Agenda Buckhead Ballroom

Day:	Time:
Alternative Investment Exchange (AIX)	9:20 AM - 9:40 AM
Networking Break	9:40 AM - 10:25 AM
WealthForge	10:25 AM - 10:40 AM
Envision Financial Systems	10:40 AM - 11:10 AM
Networking Break	11:10 AM - 11:30 AM
Docupace	11:30 AM - 11:40 AM
iCapital	11:40 AM - 12:00 PM
CNB Custody	12:00 PM - 12:10 PM
Networking Lunch	12:20 PM - 1:20 PM
Doug Buce, Boing Dynamics	1:20 PM - 1:35 PM
An "AltsTech" Discussion	1:35 PM - 2:05 PM
SS&C ALPS	2:05 PM - 2:25 PM
Panel Discussion (Grand Ballroom II & III): "Alts Electronic Business: A Discussion About Today's Solutions"	2:30 PM - 3:15 PM
Moderator: Richard Thoeny, Docupace	
Panelists:	
Tim Armenta, iCapital	
Sonny Cabral, DTCC	
Michael Page, Riskalyze	
Bill Robbins, WealthForge	
Networking Break	3:15 PM - 3:55 PM
Riskalyze	3:55 PM - 4:25 PM
Orion	4:25 PM - 4:45 PM
UMB Institutional Banking	4:45 PM - 4:55 PM
Panel Discussion, "Technology in Alternatives - Why Now is the Time to Implement"	4:55 PM - 5:35 PM
Moderator: Angie Fisher, CIM Group	
Panelists:	
Megan Bosch, WealthForge	
Chris Shaw, SS&C ALPS	
Brad West, AIX	
John Yuhas, Kalos Capital	
Doug Buce, Boing Dynamics	5:35 PM - 5:50 PM
Evening Break	5:50 PM - 6:05 PM
Networking Reception	6:05 PM - 6:35 PM
Networking Dine-arounds	6:35 PM

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Grand Ballroom II & III

Day:	Time:	Who:
Thursday, March 12, 2020		
Registration & Information Desk	7:00 AM - 2:00 PM	
Networking Breakfast	7:00 AM - 8:15 AM	All
Doug Buce, Boing Dynamics	8:15 AM - 8:25 AM	All
"State of Advice Tech"	8:25 AM - 9:15 AM	All
Kyle Van Pelt, SS&C ALPS		
"State of Alts Performance"	9:15 AM - 9:40 AM	All
James Sprow and Luke Schmidt, Blue Vault		
Networking Break & Check-Out	9:40 AM - 10:25 AM	All
Doug Buce, Boing Dynamics	10:25 AM - 10:35 AM	
Panel Discussion	10:35 AM - 11:25 AM	BDs/RIAs
Moderator: Thayer Gallison, Ladenburg Thalmann Financial Services		
Panelists:		
Larry Lyons, Kalos Financial		
Jean Merriman, The Strategic Financial Alliance		
Mike Miller, Sigma Financial Corporation		
Doug Buce, Boing Dynamics	11:25 AM - 11:35 AM	
Broker Dealer Meeting	11:35 AM - 12:30 PM	
RIA Meeting	11:35 AM - 12:30 PM	
Networking Lunch	12:30 PM - 1:30 PM	All
Conference Ends	1:30 PM	

**agenda subject to change*

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Day:	Time:
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**agenda subject to change*