

Blue Vault Bowman Alts Summit 2020

AltsTech Forum Agenda

Buckhead Ballroom

Day:

Time:

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	
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:	
Sonny Cabral, DTCC	
Michael Page, Riskalyze	
Bill Robbins, WealthForge	
Robert Worthington, iCapital	
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

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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

**agenda subject to change*