

At Deliver 2019, we have a terrific lineup of informational sessions planned for asset and wealth management firms. When building your agenda, we recommend selecting the

Tuesday, September 17

Wednesday, September 18

Thursday, September 19

Time	Session Title	Description
9:30 am – 10:20 am	Option 1: APX, Moxy and Advent Genesis: Today, Tomorrow and Beyond	With regular releases this award winning suite continues to regularly put powerful new functionality into user's hands. Solution managers will share details on important features recently added to the suite and walk you through the short-term roadmap and future vision.
9:30 am – 10:20 am	Option 2: LAB: APX, Axyx, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axyx? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.
10:50 am – 11:40 am	Option 1: Find Your Best Fit with the APX Suite and Advent Outsourcing Services	There's a reason the firms on this panel chose Advent Outsourcing Services for cloud delivery and increasingly for middle and back office services. Intrigued? Hear directly from firms who find that AOS reduces risk in operations, improves DR and generates a proven ROI.
	Option 2: All Client Portals are Not Alike	Engage clients and empower advisors with an innovative client experience offering that fits seamlessly into your existing portfolio management solution. This live demonstration will showcase Black Diamond Link, a mobile-friendly client interaction environment that also delivers aggregated data for net worth reporting, a customized dashboard experience, and a powerful integration network that helps elevate your client conversations. In addition, we'll also touch on Modestspark, another configurable investor portal with firm level dashboards to enhance your client relationships.



Tuesday, September 17 (cont.)

Time	Session Title	Description
10:50 am – 11:40 am	Option 3: Think Beyond Behavioral Finance – Neuroscience Meets Investing	Can neuroscience make us better investors? Hear what happens when CIO Eric Bennett returns to investing after switching gears to work in brain science with one of the world’s leading cognitive neuroscience institutes. Eric’s eye-opening point of view will touch upon the biology of behavioral finance, how neuroscience can teach us to make the most of the best part of our brain, achieve better decision making with big data and conclude with the implications it will have on investing in the next decade.
	Option 4: LAB: Using Position Reconciliation Tools in APX – Hands-On Discussion	APX has multiple tools to help you reconcile your positions with your data providers. Learn about and share the strategies and tools best suited to your workflow. Examine the latest reconciliation options and tools, especially the new functionality in the Position Reconciliation report. Prior experience with APX position reconciliation is strongly recommended. Bring your reconciliation workflow questions. Share your solutions. Learn from your peers and SS&C Advent experts in this client- and discussion-driven format.
1:10 pm – 2:00 pm	Option 1: Proactive Approaches to Risk Management and Organizational Resilience	As we survey our organizations, customers, markets, and environment, we find that risk management has taken on an increasing organizational importance as we strive to identify, assess, control, and track those hazards that could put our organizational strategy and objectives at risk. Today’s panel discussion draws upon the expertise of three panelists with a broad view of risk management in the context of geopolitical challenges, increasing technological disruption, and rapidly advancing cyber threats.
	Option 2: LAB: APX, Axyx, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axyx? Do you have a scenario that you’d like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.



Tuesday, September 17 (cont.)

Time	Session Title	Description
2:10 pm – 3:00 pm	Option 1: Simplicity, Speed and Scalability in Portfolio Management and Order Creation	Explore what happens when you innovate the process of order creation, rebalancing, and cash management. Our product leadership team will demonstrate the exciting real-world capabilities of Advent Genesis and invite current users on-stage to share their experience. "With Advent Genesis, we are able to double or triple our accounts without increasing the time well spend on rebalancing or trade generation." AVP Trading, Asset Management Firm.
	Option 2: 2020 Vision: Market Outlook	How will emerging technologies impact the way we transact business in 2020 and beyond? Join the SS&C Learning Institute for an educational session discussing how to future-proof your operations in the increasingly dynamic environment we are working in. Exploring the impact of data science, machine learning and artificial intelligence on the financial services industry, we will cover the skills that our future employees are going to need and how to attract, train and retain the future workforce!
	Option 3: LAB: Interpreting Performance Reports in APX – Hands-On Discussion	Performance reports may include results that may be difficult to interpret. In this session, learn about and share strategies and best practices for dealing with challenging scenarios, including analyzing non-continuous investment results for IRRs and TWRs. We'll also discuss performance proofs and update options. To get the most from this session, prior knowledge of APX performance measurement concepts and functionality is recommended. Bring your questions. Share your solutions. Learn from your peers and SS&C Advent experts in this client- and discussion-driven format.
3:30pm – 4:20 pm	LAB: APX, Axys, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axys? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.



Tuesday, September 17 (cont.)

Time	Session Title	Description
4:30 pm – 5:20 pm	Option 1: Chief Operating Officer Speaks	The role of a Chief Operating Officer includes aligning behaviors, organization design, compensation and goals across the firm. From identifying key issues to finding and investing in the best talent and systems these panelists lead corporate planning efforts and execute core strategy in concert with their colleagues in firm leadership. Join us to gain insight into the challenges our panelists face, how they look to solve them and where they see the biggest opportunities for their firms going forward.
	Option 2: Diversity and Inclusion in the Workplace. Powering Business. Leading Change	Businesses continue to re-imagine their business models. As the health and wealth industries re-define the workplaces of the future, more firms are implementing and scaling diversity and inclusion programs. Forward thinking firms are viewing the employee value proposition through a broader lens and a deeper commitment to advance diversity and inclusion in the workplace. In this discussion, we'll share diverse points of view on the value of these programs. And, learn how companies are embracing these programs and creating value for both the business and society.
	Option 3: LAB: APX, Axys, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axys? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.



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Time	Session Title	Description
8:30 am – 9:20 am	Option 1: Chief Compliance Officer Speaks	Chief compliance officers (CCOs) must balance the art of meeting increased regulations as their businesses grow and technology advances. Join our panelists for a game-changing discussion on hot topics ranging from the 2019 SEC Exam Priorities, to KYC and technology including data protection and cybersecurity. They'll share their approaches to ensuring efficiency, quality and proper cross-firm governance.
	Option 2: The 2020 GIPS Standards and Emerging Performance Trends	Join ACA Performance Services as they explain and cover an overview of the recently released GIPS 2020 Standards that will go into effect on January 1, 2020. This session will discuss the major changes that may face your firm in either becoming GIPS-compliant or allowing more flexibility in your claim of compliance, as well as current marketplace trends and the effects on the investment management industry.
	Option 3: LAB: Axys Maintenance Best Practices - Hands-On Discussion	Learn and discuss best practices and recommended workflows for a variety of tasks to maintain your Axys data and business processes. Share strategies for file and data management, managing users, groups and portfolios, and for keeping your Axys environment organized and usable. Learn from your peers and SS&C Advent experts in this client-focused and discussion-driven format.
9:30 am – 10:20 am	LAB: Interpreting Performance Reports in APX – Hands-On Discussion	Performance reports may include results that may be difficult to interpret. In this session, learn about and share strategies and best practices for dealing with challenging scenarios, including analyzing non-continuous investment results for IRRs and TWRs. We'll also discuss performance proofs and update options. To get the most from this session, prior knowledge of APX performance measurement concepts and functionality is recommended. Bring your questions. Share your solutions. Learn from your peers and SS&C Advent experts in this client- and discussion-driven format.



Wednesday, September 18 (cont.)

Time	Session Title	Description
10:50 am – 11:40 am	Option 1: How to Make the Most of Your Investment in the APX Suite	When was the last time you reviewed reports, report packages and contact management tools native to APX? Are you aware of integration across the suite to Advent Revenue Center, Advent Genesis and other solutions? Our panel will share best practices and insights to help you take full advantage of data-driven opportunities for improving the client experience and optimizing your business.
	Option 2: LAB: APX, Axys, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axys? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.
1:10 pm – 2:00 pm	LAB: APX, Axys, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axys? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.
2:10 pm – 3:00 pm	LAB: Using Position Reconciliation Tools in APX – Hands-On Discussion	APX has multiple tools to help you reconcile your positions with your data providers. Learn about and share the strategies and tools best suited to your workflow. Examine the latest reconciliation options and tools, especially the new functionality in the Position Reconciliation report. Prior experience with APX position reconciliation is strongly recommended. Bring your reconciliation workflow questions. Share your solutions. Learn from your peers and SS&C Advent experts in this client- and discussion-driven format.



Wednesday, September 18 (cont.)

Time	Session Title	Description
3:30 pm – 4:20 pm	Option 1: Trends We're Watching in Alternatives in 2020 and Beyond	The opportunity for hedge fund managers today is to meet investor demand for diversified fund allocation capabilities. The challenge is having the right infrastructure to meet that demand efficiently and profitably. This session explores some of the operational challenges of strategy proliferation and why technological transformation is imperative to gain a competitive edge in a rapidly changing marketplace. Hear first-hand from expert opinion on best practices to streamline the investment process from idea generation to settlement, across all asset classes.
	Option 2: P2P Roundtables: APX Suite & Industry	These working-group roundtables will enable you, your peers and industry experts to connect and share information on the latest opportunities and challenges facing investment managers. Each table examines a different subject ranging from cybersecurity and compliance to client reporting, performance, CRM, trading, rebalancing, technology innovation and more. Come, enjoy a lively discussion at what always proves to be one of the most popular SS&C Deliver sessions.
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4:20 pm – 5:20 pm	Option 1: APX Suite: Your Feedback on Our Roadmap!	Your feedback matters! This is your opportunity to provide input helping us prioritize future investments in the APX and Moxy suite by working directly with product development and solution managers. Bring your energy, initiatives and ideas to this highly interactive, future-changing session.
	Option 2: Your Client 360: CRM Reimagined for Financial Advisors	Today's wealth management firms need to manage a significant amount of data and complex relationships the Client 360 is the key to delivering superior client service through a connected solution that breaks down data siloes at your firm. Listen as we discuss how an integrated CRM solution provides you with the tools you need to manage and grow your business efficiently and with scale.
	Option 3: LAB: APX, Axys, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axys? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.



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Time	Session Title	Description
9:00 am – 9:50 am	<p>Option 1: Accenture: Research Findings on The Future of the RFP Process</p> <p>Option 2: Why Firms Using Axyx Are Moving to APX</p> <p>Option 3: LAB: APX, Axyx, Moxy Open Lab</p>	<p>The search and selection process for outsourced services, commonly referred to as the RFP, has not adapted to our industry that continues to evolve at a rapid pace. Many investment managers rely on dated methods to conduct searches and ultimately for choosing a partner. Poorly designed RFPs may lead to what is believed to be the best fit but could result in a misalignment partnership down the road. Bill Beaulieu from Accenture will share findings from a study conducted with several top administrators that evaluated the typical RFP approach to better understand the major pain points. The discussion will include ideas on how the practice should evolve or be completely transformed to enable a more optimal buying experience. Walk away from this session with better insights into how asset managers should engage potential administrators to ensure they are selecting the best partner.</p> <p>The benefits of converting from Axyx to APX and Advent Outsourcing Services are numerous and diverse: enhanced client management tools, easier access to data, more sophisticated reporting capabilities and a full audit trail all built on state-of-the-art technology. Spend some time with firms that have made the move to find out why they did it and the results they've realized, and get questions answered by APX experts.</p> <p>Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axyx? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.</p>



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Time	Session Title	Description
10:00 am – 10:50 am	Option 1: The 2020 GIPS® Standards and What They Mean to Your Firm	Join David Spaulding of The Spaulding Group as he provides highlights of the newly released 2020 GIPS Standards. David will discuss the major changes and how the revised standards impact both traditional and alternative asset managers.
	Option 2: Advent TransPort: Customize ACD Files and Substantially Reduce Workarounds	Advent TransPort enhances ACD Files by making them customizable to your firm's unique needs or non-standard data requirements. We invite you to join our product experts as they discuss how your firm can increase efficiency and streamline operations through this cloud-based solution. We'll demonstrate how you can reduce manual intervention and trade blotter clean-up, filter unwanted data and much more.
	Option 3: LAB: APX, Axys, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axys? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.
11:00 am – 11:50 am	LAB: APX, Axys, Moxy Open Lab	Have you ever wanted to sample Advent Portfolio Exchange, Moxy, or Axys? Do you have a scenario that you'd like to try? Come to the Open Lab, where you, along with your colleagues, can sit down and explore these products. Advent experts will be there to help you get started and to answer your questions.