



You deserve to live ahead of the curve.

September 25-26, 2019 | Swissotel, Chicago, Illinois

BACKSTOP BEYOND 2019 AGENDA						
DAY 1	TIME	ALLOCATOR TRACK		MANAGER TRACK	BACKCHAT LOUNGE	
	8:00 AM - 9:00 AM	Registration & Breakfast				1:1 Meetings with Product Team & Interactive Feedback Available All Day — Stations set up by functionality
	9:00 AM - 9:50 AM	Welcome & Keynote: Using Analytics to Build a Culture of Innovation <i>Sam Hinkie, Former President & GM of the Philadelphia 76ers</i>				
	10:00 AM - 10:50 AM	Stay Ahead of the Curve: Your 5-Year Peek Into the Future <i>Adam Hoyt, Backstop Solutions</i> We believe it's best to be proactive, rather than reactive. Our VP of Product Management, Adam Hoyt, puts on his "futurist" hat and shares the trends we're seeing our clients experience today, what we see coming around the bend in the next 5 years, and what we're doing to keep our clients "ahead of the curve."				
	10:50 AM - 11:00 AM	Break				
	11:00 AM - 11:50 AM	Decision-Making in The Age of Terrible, Horrible, Too Much, Very Lagged Data <i>Chad Erwin, Backstop Solutions</i> As an allocator, data comes at you from every channel and in every format. It comes from multiple sources and goes to multiple departments within your organization. It arrives at varying levels of depth and lag. How, then, can you harness it to improve your decision-making? Chad Erwin, our SVP of Asset Owners, shares the Backstop Solutions framework for how asset allocators can break down silos of data and make better decisions, as well as concrete examples of how our innovative institutional clients have mastered these challenges.	How To Infuse Business Intelligence Into Your Capital-Raising & Investor Relations Processes <i>Greg Fujii, Backstop Solutions</i> Time is finite. That's why professional fund marketers and investor relations professionals need to make sure they're making the most of every minute by working with focus, visibility, and clarity. Our VP of Professional Services, Greg Fujii, shares Backstop's framework for leveraging technology to infuse business intelligence into your team's daily workflows to be proactive rather than reactive, to manage your pipelines more effectively, and make sure you're having the necessary conversations with your investor base.			
	11:50 AM - 1:00 PM	Lunch and What's New in 2019 <i>Kyle Knopp, Backstop Solutions</i> <i>Deanne Folk, Backstop Solutions</i> Join us for this rapid fire course of all of the new enhancements at Backstop. We will walk through the new features and functionality that are available since our last conference.				
	1:00 PM - 1:50 PM	What Chief Investment Officers Can Learn From Chief Information Officers <i>John Pettit, Backstop Solutions</i> <i>Matt Chambers, Ehrenkranz Partners</i> <i>Jon Roller, Horsley Bridge</i> <i>Maria Roat, SBA</i> Chief Investment Officers often find themselves having to lead digital transformations within their organizations - an uncomfortable position for investment pros. On the other hand, digital transformation is right up the alley of the other kind of CIO - Chief Information Officers. We've assembled a panel of Chief Information Officers from institutional investment firms to share their hard-won wisdom and lessons learned.	The Secret Sauce to Finding and Keeping Your Long-Term Investors for the Long Term Have you ever wondered how the best teams source and service capital while building strong long-term relationships with institutional investors? Join us for a panel featuring the best in the business and uncover the secrets of their success, including how they manage their days for maximum efficiency, how they partner with portfolio managers to create effective LP interactions, and more!	Climbing the Communication Mountain Spotlight <i>Richard Phu, Backstop Solutions</i> <i>Deanne Folk, Backstop Solutions</i> In this spotlight, we will show you the easy way to get up the Mountain that is staying on top of your communication. Our Backstop Guides will help you streamline the process of entering in your interactions, reporting on it and even being notified when you need to follow up with someone.		
	2:00 PM - 2:50 PM	Portfolio Manager Client Success Showcase <i>Speaker TBD</i>	Has Your ODD Gone ADD: How To Take Control & Set Up Proactive Processes <i>Andy Phillips, Backstop Solutions</i> Is your ODD team going "ADD" trying to manage all of the data charging in through the front door with nothing but manual workflows? Have you been using your research management system as a data "dumping ground?" Are you reactively trying to figure out which managers have gone out of compliance by checking and reconciling numerous spreadsheets? Andy Phillips, Backstop's VP of Product Management, shares our 3 best ideas for how to organize your operational due diligence communications and gain maximum efficiency.	Sales & Marketing Client Success Showcase <i>Myriad Capital</i>	There is a Smart Way - and a Hard Way - To Raise Capital <i>Chris Anderson, Backstop Solutions</i> You can raise capital the smart way or the hard way. The smart way entails gaining greater visibility into pipeline and arming the sales and marketing team with the right processes and workflows to maximize their time. Join our VP of Solutions Consulting, Chris Anderson, as he shows you how the best and the brightest sales and marketing professionals in the industry leverage Backstop to intelligently, sustainably, and repeatedly raise capital.	
	2:50 PM - 3:10 PM	Break				

	3:10 PM - 4:00 PM	ODD Client Success Showcase Nationwide & UNC	Intelligent Portfolio Management: How to Combine Qualitative & Quantitative Data to Generate 6 Actionable Insights Chad Erwin, Backstop Solutions	IR Client Success Showcase GTIS	How To Establish World-Class Investor Servicing: Getting IR Teams and Deal Teams To Collaborate More Adam Pinkert, Backstop Solutions	
	4:00 PM - 5:00 PM	Manager-Allocator Dating Game				
	6:00 PM - 9:00 PM	Beyond BASH! Join us at the world's largest rooftop, Offshore, to live it up Chicago-Style				
DAY 2	7:00 AM - 8:00 AM	Beyond Balance: Meditation Yoga Sponsored by 100 Women in Finance				
	8:30 AM - 9:15 AM	Breakfast				
	9:15 AM - 9:30 AM	View From The CEO: Clint Coghill				
	9:30 AM - 10:20 AM	Reporting Client Success Showcase Freestone Capital		Power Your Capital Raising Prashant Patel, Backstop Solutions Kevin Leebroderick, Backstop Solutions Jaclyn Gerbenskey, Backstop Solutions Robert Silberschein, Backstop Solutions	Backstop Lesser Known Gems Spotlight Liz Salim, Backstop Solutions Ryan Warner, Backstop Solutions Fidel Guzman, Backstop Solutions	
	10:20 - 10:30 AM	Break				
	10:30 AM - 11:20 AM	Backstop Bests: Navigate, Search, and Input with Confidence John McGowan, Backstop Solutions Jaclyn Gerbenskey, Backstop Solutions	IDD & ODD Functional Area Masterclass Alex Crawford, Backstop Solutions Richard Phu, Backstop Solutions Dan Lowry, Backstop Solutions	Sales & Marketing Functional Area Masterclass Abel Rodriguez, Backstop Solutions Ronen Kohn, Backstop Solutions Deanne Folk, Backstop Solutions	IR Functional Area Masterclass Robert Baumann, Backstop Solutions Fidel Guzman, Backstop Solutions Kristin Sullivan, Backstop Solutions	
	11:30 AM - 12:50 PM	Lunch and Backstop & BarclayHedge: I've Followed the Hedge Fund Industry For 3 Decades and What I've Learned Will Blow Your Mind Sol Waksman, Backstop BarclayHedge				
	1:00 PM - 1:50 PM	Backstop Bests: Expand Your Backstop Marketing & Client Service Solutions Kyle Knopp, Backstop Solutions	Backstop Bests: Raise the Investment Bar with Real Estate Benjamin Crawford, Backstop Solutions Elizabeth Neumaier, Backstop Solutions Adam Pinkert, Backstop Solutions	Backstop Bests: Broaden Your Research Horizons Mike Kurze Backstop Solutions Prashant Patel, Backstop Solutions	Backstop Bests: Automate your Document and Data Flow from Managers Speaker TBD	
	2:00 PM - 2:50 PM	What A Successful Digital Transformation Looks Like John Pettit, Backstop Solutions				
	3:00 PM - 3:10 PM	Closing Clint Coghill, Backstop Solutions				