BACKSTOP BEYOND

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**
9:00 AM - 10:00 AM	**Welcome & Keynote: Using Analytics to Build a Culture of Innovation** *Sam Hinkie, Former President & GM of the Philadelphia 76ers*				
10:00 AM - 10:50 AM	**Stay Ahead of the Curve: Your 5-Year Peek Into the Future** *Adam Hoit, Backstop Solutions* We believe it's best to be proactive, rather than reactive. Our VP of Product Management, Adam Hoit, 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** *Chad Erwin, Backstop Solutions* 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** *Greg Fujii, Backstop Solutions* 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** *Kyle Knopp, Backstop Solutions* *Deanne Folk, Backstop Solutions* 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** *John Pettit, Backstop Solutions* *Jon Roller, Horsley Bridge* *Maria Roat, SBA* *Matt Chambers, Ehrenkranz Partners* 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 Haul** *Grace Reyes, AAAIM* *Tom Sherwood, Magnetar Capital* *Michael Bucella, BlockTower Capital* *Sid Makkar, ArrrowMark Partners* 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 Mountiain Spotlight** 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** ***Lisa Miller, BP of North America*** Hear how BP has been able to save time and resources by utilizing the entire Backstop suite to help assist with their portfolio management needs. ***Chris Mattke, UNC Management Co.*** Discover why UNC Management Company leans on Backstop to organize quantitative and quantifiable data across their organization.	**Has Your ODD Gone ADD: How To Take Control & Set Up Proactive Processes** *Andy Phillips, Backstop Solutions* 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** ***Kelly Wang, Myriad Capital*** See how Myriad Asset Management have utilized automation & customization of the Backstop platform to ensure anyone on their team can access information, anywhere, anytime.	**There is a Smart Way - and a Hard Way - To Raise Capital** *Chris Anderson, Backstop Solutions* 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**				
3:00 PM - 4:00 PM	**ODD Client Success Showcase** ***Allison Milliken, Nationwide*** Hear how Nationwide revolutionized their ODD process through automation and a streamlined data ingestion processes, saving hundreds of hours and resources. **Reporting Client Success Showcase** ***Sean Carr, Freestone Capital*** Private Investment Data Automation: Find out how the investment team at Freestone Capital, a Seattle-based IRA, has leveraged Backstop's Client-Defined functionality and Excel Toolkit (ETK) to automate data collection and analysis across their direct real estate and private equity investments.s.		**IR Client Success Showcase** ***Maria Szabo, GTIS*** Gain insight into how GTIS uses Backstop Portal & collaborates with Backstops' Client Care team to automate investment information.	**How To Establish World-Class Investor Servicing: Getting IR Teams and Deal Teams To Collaborate More** *Adam Pinkert, Backstop Solutions* Consolidating data concerning portfolio companies, target companies, lenders, vendors, and investors into a single system to answer questions is the underpinning of a world-class investor servicing process. Adam Pinkert, our Director of Private Equity Solutions, shares how IR and deal teams can both benefit by working more closely together and architecting a holistic data strategy.	
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**				
7:00 AM - 8:00 AM	**Beyond Balance: Meditation Yoga** **Event Partner: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	**Intelligent Portfolio Management: How to Combine Qualitative & Quantitative Data to Generate 6 Actionable Insights** *Chad Erwin, Backstop Solutions* Many institutional investors are failing to maximize the vast trove of internal and external data available to them. This is dangerous, because there are important insights that can be unlocked by marrying qualitative data and quantitative portfolio metrics to inform investment strategies. Chad Erwin, our SVP of Asset Owners, shows you our 6 biggest ideas for leveraging Backstop to generate actionable insights that bolster investment "worldviews," provide additional lenses of risk into the portfolio, and ultimately, improve decision-making.		**Backstop Bests:** **Raise the Investment Bar with Real Estate** Learn what is coming in 2019 and beyond with a brand New Real Estate Holding type, deeper Analytics, and specialized Benchmarking		**Backstop Lesser Known Gems Spotlight** Not all diamonds sparkle the same, and with Backstop there are some "hidden gems" that you might not be aware of. In this spotlight our Backstop jewelers will take you on a tour of some of our favorite features that you might not be aware of.
10:20 - 10:30 AM	**Break**				
10:30 AM - 11:20 AM	**Backstop Bests:** **Navigate, Search, and Input with Confidence** Get a personal Introduction to your new Header based upon client feedback and get the inside scoop on more efficiencies to come	**IDD & ODD Functional Area Masterclass** If you are looking to streamline how you are using Backstop, gather some best practice suggestions from Backstop pros and learn how to utilize the system and make every minute matter, this session is for you. We will walk through how to use the latest and greatest features, creative ways to get the most out of the system and how to report on your information. This Masterclass is geared towards our Allocator users. We will walk through how you can leverage some new Backstop features like Client-Defined Fund Entities, Client-Defined Opportunities, and our New Investment Vehicle in your Due Diligence process.	**Sales & Marketing Functional Area Masterclass** If you are looking to streamline how you are using Backstop, gather some best practice suggestions from Backstop pros and learn how to utilize the system and make every minute matter, this session is for you. We will walk through how to use the latest and greatest features, creative ways to get the most out of the system and how to report on your information. This Masterclass is geared towards our Sales and Marketing users. We will walk through how you can leverage new Backstop features like Client-Defined Entities and the Opportunity Pipeline to help your Capital Raising process.	**IR Functional Area Masterclass** If you are looking to streamline how you are using Backstop, gather some best practice suggestions from Backstop pros and learn how to utilize the system and make every minute matter, this session is for you. We will walk through how to use the latest and greatest features, creative ways to get the most out of the system and how to report on your information. This Masterclass is geared towards our Investor Relation users. We will walk through how you can keep your Investor Relations data up to date in Backstop and use some reporting tips and tricks to stay on top of your Investor Communications.	
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* When you spend the last 34 years tracking the hedge fund and CTA industry, you learn a few surprising things. Over lunch, Backstop BarclayHedge president, Sol Waksman, will share his perspectives, including why he founded BarclayHedge and the stories and insights he has gathered along the way.				.
1:00 PM - 1:50 PM	**Backstop Bests:** **Automate your Document and Data Flow from Managers** Preview upcoming solutions for capturing, classifying, and documents and data from your Managers.	**Backstop Bests:** **Broaden Your Research Horizons** Join a comprehensive review of the new Investment Vehicles across Multiple Asset Classes and Dynamic Research Pipeline Views	**Backstop Bests:** **Power Your Capital Raising** Explore a whole new level of team performance and business insight with Opportunity Pipeline and Opportunity Dashboards	**Backstop Bests:** **Expand Your Backstop Marketing & Client Service Solutions** See how you can narrow your focus and solve for more with the powerful capabilities of Client-Defined Contacts and Client-Defined Opportunitie	
2:00 PM - 2:50 PM	**What A Successful Digital Transformation Looks Like** *John Pettit, Backstop Solutions* At Backstop, we like to say, "Begin with the end in mind." It might be helpful to know what a successful digital transformation looks like before you even start one so you can hitch your wagon to the right star. Our CTO, John Pettit, shares the elements of successful journeys, as well as the signposts to heed along the way that might well make the difference between operational triumph and failure.				
3:00 PM - 3:10 PM	**Closing** *Clint Coghill, Backstop Solutions*				

DAY 2