FUTUREPROOF

BREAKTHRU MEETINGS GUIDELINES

Introducing Breakthru, the game-changing meetings program at Future Proof! As the world's largest platform for financial advisors, wealth management executives, institutional allocators, asset managers, and fintechs, we're set to facilitate over 10,000 meetings. Get ready for an unparalleled networking experience that will leave you speechless!

Here's what everyone is buzzing about:

- You'll get to participate in as many 15-minute speed date meetings as you'd like, maximizing your connections with up to 24 timeslots. The best part? Each meeting is a double opt-in, ensuring mutual interest and meaningful conversations. It's like swiping right for professional success!
- Meet the people you need to meet, across dozens of use cases. Whether you need to meet potential partners, discover the latest startups, find innovative solutions for your company, or even explore new career opportunities, we've got it all. Join us and unlock endless possibilities in one dynamic event.

Here's what you need to do, and when you need to do it. Expect timely updates and reminders via email, text, and more. Check your spam folder (from donotreply.fp23@eventpt.com) and reach out to us at breakthru@advisorcircle.com if needed. We're here to help!

YOU MUST	TIME	WE'LL EMAIL YOU ON		YOUR DEADLINE IS	
Assign Meetings Reps *(only for Organizations who have purchased Hosted Meetings)*	<10 mins	-	-	Tue, Aug 15	5:00 PM PST
Complete Your Profile	10 mins	Wed, Aug 2	6:00 AM PST	Tue, Aug 15	5:00 PM PST
Request Meetings	60-90 mins	Wed, Aug 16	6:00 AM PST	Wed, Aug 23	5:00 PM PST
Opt in to Requests You've Received	<30 mins	Thu, Aug 24	6:00 AM PST	Tue, Aug 29	5:00 PM PST
Accept Meetings	<10 mins	Wed, Aug 30	6:00 AM PST	Tue, Sep 5	5:00 PM PST
Accept Extra Meetings	<10 mins	Wed, Sep 6	6:00 AM PST	Wed, Sep 6	5:00 PM PST
Accept Calendar Invites	<10 mins	Thu, Sep 7	6:00 AM PST	Thu, Sep 7	5:00 PM PST
Future Proof Time! Attend Your Meetings		Mon, Sep 11	See next page for meeting timeslots!	Tue, Sep 12	See next page for meeting timeslots!
Provide Feedback	10 min	Fri, Sep 15 Onwards			

All the action takes place on Monday, September 11 and Tuesday, September 12 and you'll be in the area of the boardwalk where it happens! Below is a general schedule. We get that you may have other stuff going on, so you can opt out of any time slots you're not available for. You will not need to miss any agenda sessions for meetings.

Monday, September 11

START (PST)	END (PST)	MINS	ACTIVITY
10:50 AM	11:05 AM	0:15	Meeting Slot #1
11:05 AM	*11:08 AM*	*0:03*	*Transition Time*
11:08 AM	11:23 AM	0:15	Meeting Slot #2
11:23 AM	*11:26 AM*	*0:03*	*Transition Time*
11:26 AM	11:41 AM	0:15	Meeting Slot #3
11:41 AM	*11:44 AM*	*0:03*	*Transition Time*
11:44 AM	11:59 AM	0:15	Meeting Slot #4
1:50 PM	2:05 PM	0:15	Meeting Slot #5
2:05 PM	*2:08 PM*	*0:03*	*Transition Time*
2:08 PM	2:23 PM	0:15	Meeting Slot #6
2:23 PM	*2:26 PM*	*0:03*	*Transition Time*
2:26 PM	2:41 PM	0:15	Meeting Slot #7
2:41 PM	*2:44 PM*	*0:03*	*Transition Time*
2:44 PM	2:59 PM	0:15	Meeting Slot #8
4:20 PM	4:35 PM	0:15	Meeting Slot #9
4:35 PM	*4:38 PM*	*0:03*	*Transition Time*
4:38 PM	4:53 PM	0:15	Meeting Slot #10
4:53 PM	*4:56 PM*	*0:03*	*Transition Time*
4:56 PM	5:11 PM	0:15	Meeting Slot #11
5:11 PM	*5:14 PM*	*0:03*	*Transition Time*
5:14 PM	5:29 PM	0:15	Meeting Slot #12

Tuesday, September 12

START (PST)	END (PST)	MINS	ACTIVITY
9:45 AM	10:00 AM	0:15	Meeting Slot #13
10:00 AM	*10:03 AM*	*0:03*	*Transition Time*
10:03 AM	10:18 AM	0:15	Meeting Slot #14
10:18 AM	*10:21 AM*	*0:03*	*Transition Time*
10:21 AM	10:36 AM	0:15	Meeting Slot #15
10:36 AM	*10:39 AM*	*0:03*	*Transition Time*
10:39 AM	10:54 AM	0:15	Meeting Slot #16
1:50 PM	2:05 PM	0:15	Meeting Slot #17
2:05 PM	*2:08 PM*	*0:03*	*Transition Time*
2:08 PM	2:23 PM	0:15	Meeting Slot #18
2:23 PM	*2:26 PM*	*0:03*	*Transition Time*
2:26 PM	2:41 PM	0:15	Meeting Slot #19
2:41 PM	*2:44 PM*	*0:03*	*Transition Time*
2:44 PM	2:59 PM	0:15	Meeting Slot #20
3:50 PM	4:05 PM	0:15	Meeting Slot #21
4:05 PM	*4:08 PM*	*0:03*	*Transition Time*
4:08 PM	4:23 PM	0:15	Meeting Slot #22
4:23 PM	*4:26 PM*	*0:03*	*Transition Time*
4:26 PM	4:41 PM	0:15	Meeting Slot #23
4:41 PM	*4:44 PM*	*0:03*	*Transition Time*
4:44 PM	4:59 PM	0:15	Meeting Slot #24

UNTIL AUG 15

ASSIGN MEETINGS REPS

IF YOUR ORGANIZATION PURCHASED HOSTED MEETINGS (5 MINUTES)

YOU CAN DO THIS ON

DESKTOP

If you're an Organization Admin you (or another Org Admin) must assign individuals from your organization as Meetings Representatives (to take Hosted Meetings your organization has purchased) by **Tuesday, Aug 15 at 5 pm PST**.

- Individuals must be registered to attend Future Proof to be assigned as a Meetings Rep.
- We recommend having 1 Meetings Rep per 10 Hosted Meetings. So, if your organization has purchased 30 Hosted Meetings, you should assign 3 or more Meetings Reps. There's no limit for how many Meetings Reps your organization can have.
- Meetings Reps will be able to complete their profile from Wednesday, Aug 2 to Tuesday, Aug 15.

AUG 2 - AUG 15

COMPLETE YOUR PROFILE

(10-15 MINUTES)

YOU CAN DO THIS ON

DESKTOP MOBILE APP

Start Your Profile on **Wednesday, Aug 2**, and complete it by **Tuesday, Aug 15 at 5 pm PST**. We'll share everyone's profiles at the same time once they're all complete.

- Tell us about yourself--select from 100+ wealth management data points! This information will help others determine if they want to meet with you.
- Tell us your availability (or default to fully available) and we'll send you invites to block your calendar. Being available for more time slots increases the chances of being able to schedule meetings for you. You can change your availability at any time from Wed, Aug 2 to **Tuesday, Aug 29 at 5 pm PST**.
- Share the love! Click Post on Social to tell your Twitter followers and LinkedIn contacts that you're participating in Future Proof! While you're there, add your profile photo!
- Consider making an Announcement: Tell the thousands of Future Proof participants (including 2,000+ financial advisors) about your newly announced products, partnerships, funding, acquisitions, research and anything else!

If you're a Hosted Financial Advisory Firm & Limited Partner:

- You're required to be available for at least 16 of the 24 time slots
- Tell us if you want Non-Hosted Meetings. When you registered, you told us if you want to do Non-Hosted Meetings in addition to your requirement of up to eight (8) 15-minute onsite meetings with participating sponsors ("Hosted Meetings"). When you're completing your Profile we'll ask you to confirm your choice. We recommend doing both Hosted and Non-Hosted Meetings to get the most out of Future Proof!

If you're an Organization Admin you can edit and complete profiles on behalf of participants from your organization (they can thank you later!).

- Check out the Org Admin Pro Tips at the end of these guidelines for more info.

Registration Deadline! To participate in Breakthru, you must register before Tuesday, Aug 15 at 5 pm PST.

AUG 16 – AUG 23

REQUEST MEETINGS

(30-90 MINUTES)

YOU CAN DO THIS ON

DESKTOP MOBILE APP

"You get a meeting request! You get a meeting request! And you get a meeting request!"....be the Oprah of meeting requests! Now's the time to request to meet everyone you'd spend 15 minutes with.

Request Meetings:

- Start requesting meetings on **Wednesday, Aug 16** and complete by **Wednesday, Aug 23 at 5 pm PST**.
- Expand your squad from a ton of interesting people!
  - Select everyone you want to meet! At a minimum, we recommend you make meeting requests equal to at least 4x the number of time slots you're available for.
  - Select everyone from an organization you want to meet–you can have meetings with >1 person from the same organization (but only once we've scheduled all possible meetings with unique organizations).
  - Use Filters and Predefined Lists to quickly and efficiently make selections.
  - Don't wait til the last minute to make selections! With tools like Bookmarks, you can start your selections and come back if needed to finish them.
  - Indicate your interest level. 'Very Interested' selections get scheduled first, before 'Interested' ones.

If you're a Meetings Rep:

- Hosted Meeting requests: You should select ALL Hosted Financial Advisory Firm & Limited Partners you would like to meet (these will be Hosted Meeting requests). At a minimum, we recommend you make Hosted Meeting requests equal to at least 4x the number of Hosted Meetings your organization has purchased. E.g., if your organization has purchased 10 Hosted Meetings, you should make at least 40 Hosted Meeting requests.
  - Select everyone from an organization you want to meet—your organization won't have >1 Hosted Meeting scheduled with the same organization.
- You can also make Non-Hosted Meeting requests–select everyone you want to meet!
  - Select everyone from an organization you want to meet–you can have Non-Hosted Meetings with >1 person from the same organization (but only once we've scheduled all possible meetings with unique organizations).

Org Admins:

- You can request meetings on behalf of participants from your organization.

AUG 24 – AUG 29

OPT-IN TO REQUESTS

(UP TO 30 MINUTES)

YOU CAN DO THIS ON

DESKTOP MOBILE APP

Opt-In to Requests You Receive from People You Didn't Previously Select: They like you! They really like you! Return the love starting **Thursday, Aug 24** by opting-in to meeting requests by **Tuesday, Aug 29 at 5 pm PST**.

Everyone:

- We facilitate meetings based only on the requests you opt-in to (and your previous selections), so please opt-in to every request from someone you'd spend 15 minutes with.
- The more requests you opt in to, the more meetings you'll likely get.

If you're a Hosted Financial Advisory Firm & Limited Partner:

- You must opt-in to Hosted Meeting requests from at least 24 organizations (you can opt-in to multiple requests from the same organization, but they'll only count as 1 organization). If you receive Hosted Meeting requests from <24 organizations, then you must opt-in to the number you receive. But remember, we'll schedule only 8 Hosted Meetings max.
    - » Your Hosted Meeting requests will be displayed at the top of the screen when you log in.
- Non-Hosted Meeting requests: If you're doing Hosted and Non-Hosted Meetings and you've received Non-Hosted Meeting requests (we get it, you're popular!), you should also opt in to these as well. We facilitate meetings based only on the requests you opt-in to (and your previous meeting requests), so please opt-in to every request from someone you'd spend 15 minutes with.
- If you're a Meetings Rep: Opt-ins to requests from Hosted Financial Advisory Firm & Limited Partners will default to Hosted Meeting requests.

Org Admins:

- You can opt in on behalf of participants from your organization.

Availability Deadline! You can change your availability until Tuesday, Aug 29 at 5 pm PST.

AUG 30 – SEP 5

ACCEPT YOUR MEETINGS

(LESS THAN 10 MINUTES)

YOU CAN DO THIS ON

DESKTOP MOBILE APP

On **Wednesday, Aug 30 at 6 am PST**, you'll receive an email to review and accept each of your meetings. Please do this by **Tuesday, Sep 5 at 5 pm PST**. We promise, it won't take more than 10 minutes (if that!).

Everyone:

- You get meetings with people you selected who also selected you...so, not accepting meetings might disappoint others!
- If you don't accept a meeting by the deadline, that meeting won't get scheduled
- You need to accept your own meetings--Org Admins cannot accept on your behalf.

If you're a Hosted Financial Advisory Firm & Limited Partner:

- You must accept all of your Hosted Meetings (max of 8). You won't be penalized if the other person doesn't accept.
- You should also accept your Non-Hosted Meetings (if any).

If you're a Meetings Rep:

- You must accept all of your Hosted Meetings. Hosted Meetings that aren't accepted will not be refunded to your organization.
- You should also accept your Non-Hosted Meetings (if any).

SEP 6 – SEP 7

ACCEPT ADDITIONAL MEETINGS AND CALENDAR INVITES

(LESS THAN 10 MINUTES)

YOU CAN DO THIS ON

DESKTOP MOBILE APP

Accept Any Additional Meetings: If you've got any additional meetings, on **Wednesday, Sep 6 at 6 am PST**, you'll receive an email to accept them. Please accept these meetings **Wednesday, Sep 6 by 5 pm PST**. This is a quick turnaround, but it won't take more than 5 minutes.

- Extra meetings are either replacements for meetings that were not accepted by the other participant, or new meetings from your previous selections where others have become available.
- If you previously rejected (or didn't accept) a meeting, you won't be eligible to get an additional meeting in that timeslot.

Accept Your Meetings Calendar Invites: On **Thu, Sep 7 at 6 am PST**, you'll receive a calendar invite for each scheduled meeting. YOU MUST ACCEPT all calendar invites **Thursday, Sep 7 by 5 pm PST**. It won't take more than 5 minutes.

- Important Note: Neither we nor the person you're meeting will be notified if you decline a calendar invite! So email us at breakthru@advisorcircle.com if you really can't make it to a meeting. **It's not enough to simply decline a calendar invite.**
- We can't change any meeting times (fun fact: Future Proof is enabling 10,000+ meetings!), and you should not reschedule Future Proof scheduled meetings outside of the program.
- If a person you're scheduled to meet is no longer available, we'll let you know--people have emergencies, so this does happen once in a while!

SEP 11 - SEP 12

ATTEND YOUR FUTURE PROOF MEETINGS

It's time! You're at the biggest meetings program in wealth management! Don't leave 'em hanging! You must join all your scheduled meetings. Not showing up may result in you--and your organization--being barred from future participation. Here's what you need to know:

- Where are the meetings? All meetings are held in a dedicated Breakthru area (the size of a football field!) and each meeting is assigned a table number.
- How do I know where to go? Check the Future Proof mobile app (or your calendar invites) for the assigned table number for each meeting, and at the start of each scheduled meeting proceed directly to the assigned table for your meeting (table numbers are in your calendar invites).
- When should I arrive? You should arrive at the Breakthru area 5-10 minutes before your first scheduled meeting. There is no check-in required. If you have any questions, there will be a Q&A desk.
- What happens if the person I'm meeting doesn't show up? Give them 5 minutes and if they've still not joined, click the "Mark as No Show" button in the Future Proof mobile app.
- What other Do's and Don'ts are there?
    - » Do join each meeting on time and don't exceed the allotted 15 minutes for each scheduled meeting.
    - » Do check the table number for each scheduled meeting--each of your meetings will be at a different table. There is a 3-minute transition time between each meeting.
    - » Do download the Future Proof mobile app ahead of your meetings (if you haven't already). You can take notes and request follow-ups in the app.
    - » Do let us know if a solution provider directly reaches out to you about Future Proof, which they have been instructed not to do.
    - » Don't approach anyone in the Breakthru area with whom you do not have a Breakthru meeting.
    - » Don't enter the Breakthru area at any time you do not have a Breakthru meeting.

SEP 15 ONWARDS

PROVIDE FEEDBACK

YOU CAN DO THIS ON

DESKTOP MOBILE APP

- Help us to help you! On **Friday, Sep 15**, you will receive an email to provide feedback on your meetings, the meetings program, and the event to help us improve Future Proof--please share your thoughts!
  - Once you provide feedback, you can download a summary of your meetings, including your notes and contact details of who you met.
- Show me the money! If you're a Hosted Financial Advisory Firm & Limited Partner, from Mon, Oct 2, submit your expenses via the Future Proof platform to claim up to $750 of travel and hotel reimbursement. We provide reimbursements on a rolling basis and no later than Fri, Nov 10.

SOME FINE PRINT: Our participant list is confidential, and shouldn't be (1) shared with anyone else, (2) downloaded or (3) used other than as described by us. Based on information you receive as part of Breakthru, you can't solicit participants (including individuals you're scheduled to meet prior to your meetings) outside of the event other than as we permit. If you breach this provision, you may be eliminated from further participation and barred from future programs. Do not assume that requests (or opt-ins) to meet with you as part of Breakthru indicate any interest in meeting with you outside of Breakthru.

Organization Admins: Pro Tips

If you're an Org Admin, here's some some more helpful info:

Completing Org Admin tasks:

- To help complete action items for participants and your organization, you'll need to use your desktop (the mobile app does not support Org Admin activities). If you're a participant just completing action items for yourself, you can use the mobile app.

'Manage Participants & Roles' screen: From this screen you can:

- Select who you want to manage: Go to 'Manage Participants & Roles' and select the participants from your organization that you want to 'Manage As Org Admin'. Voilà–you can help complete action items for them.
- Add or Assign Org Admins: Need some Org Admin backup? Click 'Add New Org Admin' to add unregistered individuals as Org Admins, or click 'Assign' to assign participants as Org Admins.

Managing different types of Participants:

- Your organization may have individuals participating in Breakthru who have different roles, for example (1) Hosted Financial Advisory Firm & Limited Partner, (2) Meetings Reps (if your organization has purchased Hosted Meetings), or (3) General participants.
- As an Org Admin, you can help complete action items for any individuals from your organization, irrespective of their role. Please review these guidelines to understand the required action items at each stage.

Request Meetings stage:

- 'Manage Organization's Participants' Selections' screen: If you want to help make selections for some or all of the participants you're managing, check the boxes next to their names.
- Org Admin view: Org Admins can request meetings for multiple participants from a single screen. Your productivity just went up!!
  - » To request to meet an individual for one or more of the participants you're requesting meetings for, indicate each participant's interest level ('Interested' or 'Very Interested'). You can also add a reason for each request.
  - » If you view a System Generated List, you can see if it applies to all, or only some, of the participants you're requesting meetings for.
  - » You can see if an individual has been selected by other participants from your organization (if they've shared their meeting requests with one or more of the participants you're requesting meetings for).
- Collaboration & Efficiency tools: Just like regular participants, Org Admins can use the full range of collaboration and time-saving features:
  - » Bookmarks: If you're not sure you want to request to meet someone (for the participants you're requesting meetings for, or yourself if you're a participant), simply Bookmark them and decide later (they'll be under 'Bookmarks').
  - » Saved Lists: Click 'Save List' to name and save a specific search/filter result so you can come back to it later (it'll be under 'My Lists').

- Meetings Rep-specific functionality:
    - Share Saved Lists: If you're a Meetings Rep and an Org Admin, you can share your saved lists with all Meetings Reps from your organization by toggling the slider when you are saving or editing the list. They'll automatically get any changes you make.
    - Lists Shared With Me: If you're a Meetings Rep and an Org Admin, if Meetings Reps from your organization have shared their lists, they'll be under 'Lists Shared With Me'.
    - Share Participants' Requests: You can share the meeting requests of the Meetings Reps you're requesting meetings for from the 'Manage Participants' meeting requests screen. If you're a Meetings Rep, you can share your own meeting requests from there as well. Note that meeting requests can only be shared with other Meetings Reps.

- Meeting Requests Progress: Click the tooltip at the top of the screen to track the progress of participants you're helping manage against their recommended minimum number of meeting requests.

Accept Meetings onwards:

From the Accept Your Meetings stage onwards, you may view the ongoing progress and status of the participants you want to manage, including:

- View if participants have accepted their meetings
- View if participants have accepted any additional meetings
- View participants' scheduled meetings
- View if participants have provided feedback