

FUTURE PROOF RETREAT GUIDELINES

HOSTED FINANCIAL ADVISORS, WEALTH
MANAGEMENT EXECS, & LIMITED PARTNERS

8-minute read



FUTURE PROOF RETREAT

MARCH 24-27, 2024
COLORADO SPRINGS, CO

Future Proof Retreat's Breakthru Programs are transforming the way Financial Advisors, Wealth Management Execs, and Limited Partners ("Hosted Attendees") build the connections and networks they need. As a Hosted Attendee, you will take part in:

Three Featured Breakthru Programs:

- Breakthru Hosted Meetings: the Wealth Management industry's leading meetings program. We will facilitate 5,000+ meetings that you will be a part of!
 - Meet with up to 10 participating Investment Managers, Wealthtechs, and other Financial Services Providers who have products, solutions and services that can help your business achieve its goals. You can also meet with other Financial Advisors, Wealth Management Execs, & Limited Partners, taking your networking at Future Proof Retreat to the next level!
 - All meetings are 15 minutes and are double opt-in (you both "swiped right").
- Breakthru Hosted Talks: peer group roundtable discussions with 5-8 Hosted Attendee peers on key industry topics. These will give you an opportunity to meet with, learn from and share ideas with peers.
- Breakthru Hosted Experiences:
 - Breakthru Networking Dinners: 15-25 person Hosted Attendee networking dinners.
 - Breakthru Activities: Intimate indoor & outdoor group activities such as fly fishing, hiking, ziplining, beauty workshops, and more.
 - Industry Content: Expert-level content meticulously curated for your firm's growth.
 - Level Up Content: Shared learning experiences that foster growth in all aspects of life and work.

What else is included:

- A free Future Proof Retreat ticket, with full access to all Future Proof Retreat programs, experiences, agenda sessions and social activities.
- Up to \$1,500 travel and hotel reimbursement.

What you need to do, and when you need to do it.

Your participation is what makes these programs the most successful! Updates and reminders will be sent via email and texts. Check your spam folder (from donotreply.fpr24@eventpt.com) and reach out to us at register@advisorcircle.com with any questions.



| | TASK | TIME | TASK OPENS | | TASK DEADLINE | |
|----|---|---------------|-----------------------------|----------------------------|--------------------------------|----------------------------|
| 1a | Complete Your Profile Hosted Attendee Registration Deadline | 10-15 minutes | Tuesday, February 20 | 7:00 AM MT / 9:00 AM ET | Friday, March 1 | 6:00 PM MT / 8:00 PM ET |
| 1b | Select Your Breakthru Talks | 5 minutes | | | Friday, March 8 | |
| 1c | Select Your Breakthru Experiences | 5 minutes | | | Friday, March 8 | |
| 2 | Request Meetings | 30-90 minutes | Monday, March 4 | 7:00 AM MT / 9:00 AM ET | Friday, March 8 | 6:00 PM MT / 8:00 PM ET |
| 3a | Opt In to Meetings Requests | <30 minutes | Tuesday, March 12 | 7:00 AM MT / 9:00 AM ET | Friday, March 15 | 6:00 PM MT / 8:00 PM ET |
| 3b | Accept Breakthru Talks Assignments | <5 minutes | | | | |
| 4 | Accept Breakthru Meetings | <5 minutes | Monday, March 18 | 7:00 AM MT / 9:00 AM ET | Wednesday, March 20 | 6:00 PM MT / 8:00 PM ET |
| 5 | Accept Additional Breakthru Meetings | <5 minutes | Thursday, March 21 | 7:00 AM MT / 9:00 AM ET | Thursday, March 21 | 6:00 PM MT / 8:00 PM ET |
| 6 | Accept Calendar Invites for Breakthru Programs | <5 minutes | Friday, March 22 | 7:00 AM MT / 9:00 AM ET | Friday, March 22 | 6:00 PM MT / 8:00 PM ET |
| 7 | Attend Future Proof Retreat and Join Your: <ul style="list-style-type: none"> • Breakthru Meetings • Breakthru Talks • Breakthru Experiences | -- | Sunday, March 24 | - | Wednesday, March 27 | - |
| 8 | Provide Feedback | <15 minutes | Friday, March 29 | 7:00 AM MT / 9:00 AM ET | Friday, April 12 | 6:00 PM MT / 8:00 PM ET |
| 9 | Claim Reimbursement | <10 minutes | Monday, April 15 | 7:00 AM MT / 9:00 AM ET | Friday, May 24 | 6:00 PM MT / 8:00 PM ET |

SCHEDULE OF BREAKTHRU PROGRAMS

As a Hosted Attendee, you must be available for:

- Breakthru Hosted Meetings Program: all 4 sessions (each session = 4 meeting time slots). We will only schedule you for up to 10 Hosted Meetings, plus any Non-Hosted Meetings you have
- Breakthru Hosted Talks: all 3 sessions. You are required to do at least 1 Breakthru Talk, but can do up to 3 (most people do!).
- Breakthru Experiences: You are required to participate in Breakthru Networking Dinner on Monday evening from 7-9pm MT.

We will send you calendar holds for each Program when you complete your Meetings Profile, Select Your Breakthru Hosted Talks and Select Your Breakthru Experiences.

Monday, March 25, 2024

| START (MT) | END (MT) | BREAKTHRU PROGRAM | AVAILABILITY REQUIRED | ADDITIONAL DETAILS |
|------------|----------|--|-----------------------|---|
| 10:45 AM | 11:54 AM | Breakthru Hosted Meetings Session 1 | ✓ | Meeting 1: 10:45 AM - 11:00 AM MT Break: 11:00 AM - 11:03 AM MT Meeting 2: 11:03 AM - 11:18 AM MT Break: 11:18 AM - 11:21 AM MT Meeting 3: 11:21 AM - 11:36 AM MT Break: 11:36 AM - 11:39 AM MT Meeting 4: 11:39 AM - 11:54 AM MT |
| 12:05 PM | 12:50 PM | Breakthru Hosted Talks Session 1 | ✓ | |
| 1:45 PM | 2:54 PM | Breakthru Hosted Meetings Session 2 | ✓ | Meeting 5: 1:45 PM - 2:00 PM MT Break: 2:00 PM - 2:03 PM MT Meeting 6: 2:03 PM - 2:18 PM MT Break: 2:18 PM - 2:21 PM MT Meeting 7: 2:21 PM - 2:36 PM MT Break: 2:36 PM - 2:39 PM MT Meeting 8: 2:39 PM - 2:54 PM MT |
| 3:20 PM | 5:55 PM | Breakthru Experiences: Activities and Content | | Choose between or a combination of: <ul style="list-style-type: none"> • 10 Group Activities • 3 Industry Content Sessions • 3 Level Up Sessions |
| 7:00 PM | 9:00 PM | Breakthru Hosted Experiences: Networking Dinners | ✓ | Choose between 12 different venue and food options across The Broadmoor. |



Tuesday, March 26, 2024

| START (MT) | END (MT) | BREAKTHRU PROGRAM | AVAILABILITY REQUIRED | ADDITIONAL DETAILS |
|------------|----------|---|-----------------------|--|
| 8:00 AM | 8:45 AM | Breakthru Hosted Talks Session 2 | ✓ | |
| 10:45 AM | 11:54 AM | Breakthru Hosted Meetings Session 3 | ✓ | Meeting 9: 10:45 AM - 11:00 AM MT Break: 11:00 AM - 11:03 AM MT Meeting 10: 11:03 AM - 11:18 AM MT Break: 11:18 AM - 11:21 AM MT Meeting 11: 11:21 AM - 11:36 AM MT Break: 11:36 AM - 11:39 AM MT Meeting 12: 11:39 AM - 11:54 AM MT |
| 12:05 PM | 12:50 PM | Breakthru Hosted Talks Session 3 | ✓ | |
| 1:45 PM | 2:54 PM | Breakthru Hosted Meetings Session 4 | ✓ | Meeting 13: 1:45 PM - 2:00 PM MT Break: 2:00 PM - 2:03 PM MT Meeting 14: 2:03 PM - 2:18 PM MT Break: 2:18 PM - 2:21 PM MT Meeting 15: 2:21 PM - 2:36 PM MT Break: 2:36 PM - 2:39 PM MT Meeting 16: 2:39 PM - 2:54 PM MT |
| 3:20 PM | 5:55 PM | Breakthru Experiences: Activities and Content | | Choose between or a combination of: <ul style="list-style-type: none"> • 10 Group Activities • 3 Industry Content Sessions • 3 Level Up Sessions |
| 7:00 PM | 9:00 PM | Breakthru Experiences: Closing Night Reception | | |

Wednesday, March 27, 2024

| START (MT) | END (MT) | BREAKTHRU PROGRAM | AVAILABILITY REQUIRED | ADDITIONAL DETAILS |
|------------|----------|--|-----------------------|---|
| 8:00 AM | 11:30 AM | Breakthru Experiences: Activities and Content | | Choose between or a combination of: <ul style="list-style-type: none"> • 2 Group Activities • 3 Level Up Sessions |

IMMEDIATE NEXT STEPS

Book Your Travel & Hotel

- **Book your travel and hotel**
 - Flights: We recommend arriving on **Sunday, March 24** and leaving on **Wednesday, March 27**. The closest airports are Colorado Springs Airport (COS), a 15-minute drive to The Broadmoor, and Denver International Airport (DEN), a 75-minute drive from The Broadmoor.
 - Hotel: Book your room at The Broadmoor using the link provided to you in your attendee confirmation email.

FEB 20 – MAR 1

BREAKTHRU HOSTED MEETINGS: COMPLETE YOUR PROFILE

(10-15 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

1. **Start Your Profile on Tuesday, February 20 at 7:00 AM MT, and complete it by Friday, March 1 at 6:00 PM MT.**

- Tell us about yourself and add a profile photo! Select from 100+ wealth management data points to provide information that will help participating Asset Managers & Fintechs determine if they want to meet with you.
- Tell us if you want Non-Hosted Meetings with other Hosted Attendees, in addition to your requirement of up to ten (10) 15-minute onsite meetings with participating sponsors (“Hosted Meetings”). We recommend doing both Hosted and Non-Hosted Meetings to get the most out of Future Proof!
- Confirm your availability and we’ll send you invites to block your calendar. As a Hosted Attendee, you must be available for all 16 time slots, however we will only schedule you for up to 10 Hosted Meetings (plus any Non-Hosted meetings with other Financial Advisors, Wealth Management Execs & Limited Partners we’re able to schedule).
- Share on social! Click “Post on Social” to tell your X followers and LinkedIn contacts that you are participating in Future Proof Retreat!

Organization Admins can edit and complete profiles on behalf of Hosted Attendees from your company. Check out the Organization Admin Pro Tips at the end of these guidelines for more info.

To qualify for free Hosted tickets to Future Proof Retreat, your colleagues must register before **Friday, March 1 at 6:00 PM MT**.

FEB 20 – MAR 8

BREAKTHRU HOSTED TALKS: SELECT YOUR BREAKTHRU HOSTED TALKS

(5 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

1. Start Your Breakthru Hosted Talks selections on Tuesday, February 20 at 7:00 AM MT, and complete them by Friday, March 8 at 6:00 PM MT.

- Breakthru Hosted Talks are 45-minute peer group roundtable discussions with 5-8 Financial Advisor, Wealth Management Exec, & Limited Partner peers on key industry topics. They are held from 12:05 PM – 12:45 PM MT on Mon, March 25; and from 8:00 AM – 8:45 AM MT and 12:05 PM – 12:50 PM MT on Tuesday, March 26.
- As a Hosted Attendee, you must:
 - » Select a minimum of 1 topic
 - » Indicate you are interested in joining 1 or more Breakthru Hosted Talks. You are required to do at least 1 Breakthru Talk, but you can do up to 3 (most people do!).
 - » Be available for all 3 sessions. We will send you invites to block your calendar.
- You can tell us what questions you would like discussed and any companies you would prefer not to be placed with (yes, you can avoid competitors).

Organization Admins cannot select Breakthru Hosted Talks (or do any other Breakthru Hosted Talks actions) on your behalf. Check out the Organization Admin Pro Tips at the end of these guidelines for more info.

FEB 20 – MAR 8

BREAKTHRU EXPERIENCES: SELECT YOUR EXPERIENCES

(5 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

1. Start Your Breakthru Experiences selections on Tuesday, February 20 at 7:00 AM MT, and complete them by Friday, March 8 at 6:00 PM MT.

- Breakthru Experiences are unique experiences, ranging from Falconry to Fashion Styling Workshops, including outdoor and indoor activities.

- You can view details of all Experiences including location, description, sponsor (if any) and time slots.
 - Selecting an Experience does not guarantee you will be scheduled for it, so we recommend you select all Experiences you would attend.
 - We will send you invites to block your calendar for all the Experiences you select.
- As a Hosted Attendee, you must select the Breakthru Dinners. All other Experiences are optional.
- If you are scheduled for an Experience, you will receive a calendar invite on Friday, March 22.

MAR 4 – MAR 8

BREAKTHRU HOSTED MEETINGS: REQUEST MEETINGS

(30-60 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

1. Start requesting Meetings on Monday, March 4 at 7:00 AM MT and complete by Friday, March 8 at 6:00 PM MT.

- Select everyone you want to meet! If you're doing Hosted and Non-Hosted Meetings, you'll be able to request meetings with participating sponsors and other Financial Advisors, Wealth Management Execs, & Limited Partners..
- 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 a company you want to meet—you can have meetings with >1 person from the same company (but only once we've scheduled all possible meetings with unique companies).
- 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.

Org Admins: You can request meetings on behalf of participants from your company.

MAR 12 – MAR 15

BREAKTHRU HOSTED MEETINGS: OPT IN TO MEETING REQUESTS

(30-60 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

1. **Start opting in to Meeting requests you received from people you didn't previously select on Tuesday, March 12 at 7:00 AM MT and complete by Friday, March 15 at 6:00 PM MT.**

- **You must opt-in to Hosted Meeting requests from at least 30 companies** (you can opt-in to multiple requests from the same company, but they'll only count as 1 company). If you receive Hosted Meeting requests from <30 companies, then you must opt-in to the number you receive. But remember, we'll schedule only 10 Hosted Meetings max.
- Hosted Meeting requests you have received from participating Investment Managers, Wealthtechs, and other Financial Services Providers 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 (from other Financial Advisors, Wealth Management Execs, & Limited Partners), 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. The more requests you opt in to, the more meetings you'll likely get.
- Click 'Very Interested' or 'Interested' to opt in. 'Very Interested' opt-ins get scheduled first, before 'Interested' ones.
- Opt-ins are saved automatically as you go.

Org Admins: You can opt in on behalf of participants from your company.

MAR 12 – MAR 15

BREAKTHRU HOSTED TALKS: ACCEPT BREAKTHRU HOSTED TALKS ASSIGNMENTS

(5 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

1. **Accept Your Breakthru Hosted Talks Assignments: You will get your Breakthru Talks assignments on Tuesday, March 12 at 7:00 AM MT and you must accept them by Friday, March 15 at 6 PM MT.**

Breakthru Hosted Talks is where you will broaden your peer network as well as discuss and debate key industry topics. Reminder: As a Hosted Attendee, you must participate in at least one Breakthru Hosted Talk

MAR 18 – MAR 20

BREAKTHRU HOSTED MEETINGS: ACCEPT YOUR BREAKTHRU MEETING REQUESTS

(<5 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

1. On Monday, March 18 at 7:00 AM MT, you will receive an email to review and accept each of your Meetings. You must complete this by Wednesday, March 20 at 6:00 PM MT

- You must accept all of your Hosted Meetings (max of 10). You won't be penalized if the other person doesn't accept.
- You should also accept your Non-Hosted Meetings with other Financial Advisors, Wealth Management Execs, & Limited Partners (if any).

MAR 21

BREAKTHRU HOSTED MEETINGS: ACCEPT ANY ADDITIONAL MEETING REQUESTS

(<5 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

1. Accept Any Additional Meetings: If you've got any additional meetings, on Thursday, March 21 at 7:00 AM MT, you'll receive an email to accept them. Please accept these meetings THE SAME DAY by 6:00 PM MT. This is a quick turnaround, but it won't take more than 5 minutes.

- Additional 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.

MAR 22

**ACCEPT CALENDAR INVITES FOR BREAKTHRU HOSTED MEETINGS,
BREAKTHRU HOSTED TALKS AND BREAKTHRU HOSTED EXPERIENCES**

(<5 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

- 1. On Friday, March 22 at 7:00 AM MT, you will receive a calendar invite for each Meeting, including details of who you will meet . YOU MUST ACCEPT all calendar invites THE SAME DAY by 6:00 PM MT.**
 - We cannot change any meeting times (fun fact: we're enabling 5,000+ Meetings!) and cannot reschedule meetings.
 - If a person you are scheduled to meet is no longer available, you will be notified by email and calendar invite cancellation. People do have emergencies, so this can happen occasionally.
 - If you are no longer planning on attending Future Proof Retreat, please let us know at register@advisorcircle.com.
- 2. On Friday, March 22 at 7:00 AM MT, you will also receive separate calendar invites for your scheduled Breakthru Hosted Talks and Breakthru Hosted Experiences. Please accept each calendar invite THE SAME DAY by 6:00 PM MT.**
 - The only change we can make to your Breakthru Hosted Talks or Breakthru Hosted Experiences is to drop you from them.
 - We will not know if you reject a calendar invite! Email us at register@advisorcircle.com if you absolutely cannot make a:
 - » Breakthru Talk, email us at register@advisorcircle.com
 - » Breakthru Experience: in 'My Schedule', click 'Not Attending'. Alternatively, email us at register@advisorcircle.com.

MAR 24 – MAR 27

ATTEND FUTURE PROOF RETREAT

- 1. Join Your Breakthru Hosted Meetings: As a Hosted Attendee, you must join all your scheduled meetings (you will be scheduled for up to 10).**

- Know Before You Go:
 - » Where are the meetings? All meetings are held in a dedicated Breakthru Meetings area, and each meeting is assigned a table number.
 - » How do I know where to go? Check the Future Proof Retreat mobile app or your calendar invites for the assigned table number for each meeting. At the start of each scheduled meeting proceed directly to the assigned table.
 - » When should I arrive? You should arrive at the Breakthru Meetings area a few 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 Retreat mobile app.
- Best Practices:
 - » Be on time and don't exceed the allotted 15 minutes for each scheduled meeting.
 - » Check the table number for your scheduled meetings. Each of your meetings will be at a different table. There is a 3-minute transition time between each meeting.
 - » 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.
 - » Let us know if a solution provider directly reaches out to you about Future Proof, which they have been instructed not to do.

2. Join Your Breakthru Hosted Talks:

- Know Before You Go:
 - » When are the Breakthru Hosted Talks? There is one session on Monday, March 25 from 12:05 PM - 12:45 PM MT and two sessions on Tuesday, March 26, from 8:00 AM - 8:40 AM MT and 12:05 PM - 12:45 PM MT.
 - » Where are the Breakthru Hosted Talks? All Breakthru Hosted Talks are held in a dedicated Breakthru Talks area and each Talk is assigned a table number (check your calendar invite or the mobile app for the table number). Breakfast or Lunch will be available in the Breakthru Hosted Talks area.
 - » How do we start the discussion? Each discussion will have either a moderator or a randomly assigned "Starter" who will kick off by introducing themselves. Each participant should do a short intro (60 seconds max.) and then call on another to introduce themselves. The last participant to do an intro should read the first of the suggested questions to start the conversation. Everyone should help move the conversation along. If the discussion has a moderator, this person will also help facilitate the discussion.

3. Attend your Scheduled Breakthru Hosted Experiences Activities:

Important Information:

- You must attend all of your scheduled Experiences. Since we have optimized scheduling for all Experiences and attendees, failing to attend will result in other Future Proof Retreat attendees having missed out.
- Bring your Future Proof Retreat badge to your scheduled Experience to enable a fast check-in.

MAR 29 – MAY 24

**SUBMIT FEEDBACK SURVEY &
SUBMIT EXPENSES FOR REIMBURSEMENT**

(10 MINUTES)

YOU CAN DO THIS ON



DESKTOP



MOBILE APP

- 1. Your feedback is important to us! You will receive an email on Friday, March 29 at 6:00AM PT to provide feedback on your Breakthru Hosted Meetings, Talks and Experiences and the overall event to help us improve Future Proof Retreat. You must share your thoughts by Friday, April 26 at 6:00 PM MT to be eligible for reimbursements.**
 - After you provide feedback, you can download a summary of your meetings, including your notes and contact details of who you met.
- 2. Show me the money! If you followed all of the Hosted Attendee requirements, you are eligible for reimbursements up to \$1,500. You will receive an email on Monday, April 15 at 7:00 AM MT to submit your receipts for reimbursement. You must submit your expenses by Friday, May 24 at 6:00 PM MT.**
 - Submit your expenses via the Future Proof platform to claim up to \$1,500 of travel and hotel reimbursement. We provide reimbursements on a rolling basis.

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 programs, 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 the Breakthru Hosted Meetings Program indicate any interest in meeting with you outside of the Breakthru Hosted Meetings Program.

Organization Admins: Pro Tips

Completing Organization Admin tasks:

The mobile app does not support Org Admin activities. You must complete all tasks on Desktop.

| | TASK | TASK OPENS | TASK DEADLINE | ORGANIZATION ADMIN CAN |
|----|---|-----------------------------|--------------------------------|-----------------------------------|
| 1a | Complete Your Profile Hosted Attendee Registration Deadline | Tuesday, February 20 | Friday, March 1 | Complete Tasks |
| 1b | Select Your Breakthru Talks | | Friday, March 8 | Not Applicable |
| 1c | Select Your Breakthru Experiences | | Friday, March 8 | Not Applicable |
| 2 | Request Meetings | Monday, March 4 | Friday, March 8 | Complete Tasks |
| 3a | Opt In to Meetings Requests | Tuesday, March 12 | Friday, March 15 | Complete Tasks |
| 3b | Accept Breakthru Talks Assignments | | | Not Applicable |
| 4 | Accept Breakthru Meetings | Monday, March 18 | Wednesday, March 20 | View Only |
| 5 | Accept Additional Breakthru Meetings | Thursday, March 21 | Thursday, March 21 | View Only |
| 6 | Accept Calendar Invites for Breakthru Programs | Friday, March 22 | Friday, March 22 | Not Applicable |
| 7 | Attend Future Proof Retreat and Join Your: <ul style="list-style-type: none"> Breakthru Meetings Breakthru Talks Breakthru Experiences | Sunday, March 24 | Wednesday, March 27 | View Only (Breakthru Meetings) |
| 8 | Provide Feedback | Friday, March 29 | Friday, April 12 | View Only |
| 9 | Claim Reimbursement | Monday, April 15 | Friday, May 24 | Not Applicable |

Manage Participants & Roles' allows you to:

- Select who you want to manage: Go to 'Manage Participants & Roles' and select the participants from your company that you want to 'Manage As Org Admin'.
- Add or Assign Organization Admins: Click 'Add New Org Admin' to add unregistered individuals as Organization Admins, or click 'Assign' to assign participants as Organization Admins.

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.
- Click the tooltip at the top of the screen to track the progress of participants you are managing against their recommended minimum number of meeting requests.
- 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 company (if they've shared their meeting requests with one or more of the participants you're requesting meetings for).
- Collaboration & Efficiency tools: use the full range of collaboration and time-saving features:
 - » Bookmarks: If you're not sure you want to request to meet someone, simply Bookmark them and decide later. They will be saved 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 will be under 'My Lists.'

Accept Meetings and 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 participants' scheduled meetings
- View if participants have provided feedback