

# FUTURE PROOF RETREAT GUIDELINES

Sponsor Organization Admins  
& Meetings Reps

8-minute read



# FUTURE PROOF RETREAT

MARCH 24-27, 2024  
COLORADO SPRINGS, CO



Future Proof Retreat's Breakthru Hosted Meetings Program is the leading meetings program in the wealth management industry. It will facilitate over 5,000 on-site 15-minute qualified meetings between Financial Advisors, Wealth Management Execs, Limited Partners ("Hosted Attendees") and Investment Managers, Wealthtechs, and other Financial Services Providers ("Sponsor Org Admins" and "Meetings Reps") ...and your company will be included!

The Breakthru Hosted Meetings Program provides complimentary Future Proof Retreat tickets and travel and hotel reimbursements to qualified Hosted Attendees who allocate to investment products or buy or influence the purchase of technology or other solutions. In return, these Hosted Attendees have each agreed to join up to ten 15-minute Hosted Meetings with our sponsors. Your company has purchased Hosted Meetings!

**Organization Admins** can complete meetings program tasks for your company and Meetings Reps you want to manage.

**Meetings Reps** meetings program tasks start on **Tuesday, February 20** with completing their Profile.

**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](mailto:donotreply.fpr24@eventpt.com)) and reach out to us at [register@advisorcircle.com](mailto:register@advisorcircle.com) with any questions.

	TASK	TIME	TASK OPENS		TASK DEADLINE	
1	<a href="#">Assign Meetings Reps</a>	<10 minutes	-	-	Friday, March 1	6:00 PM MT / 8:00 PM ET
2	<a href="#">Complete Your Profile</a>	10 minutes	Tuesday, February 20	7:00 AM MT / 9:00 AM ET	Friday, March 1	6:00 PM MT / 8:00 PM ET
3	<a href="#">Request Meetings</a>	60-90 minutes	Monday, March 4	7:00 AM MT / 9:00 AM ET	Friday, March 8	-
4	<a href="#">Opt In to Requests You've Received</a>	<30 minutes	Tuesday, March 12	7:00 AM MT / 9:00 AM ET	Friday, March 15	6:00 PM MT / 8:00 PM ET
5	<a href="#">Accept Meetings</a>	<10 minutes	Monday, March 18	7:00 AM MT / 9:00 AM ET	Wednesday, March 20	6:00 PM MT / 8:00 PM ET
6	<a href="#">Accept any Additional Meetings</a>	<10 minutes	Thursday, March 21	7:00 AM MT / 9:00 AM ET	Thursday, March 21	6:00 PM MT / 8:00 PM ET
7	<a href="#">Accept Meeting Calendar Invites</a>	<10 minutes	Friday, March 22	7:00 AM MT / 9:00 AM ET	Friday, March 22	6:00 PM MT / 8:00 PM ET
	<a href="#">Future Proof Retreat time! Attend Your Meetings</a>	-	Monday, March 25	-	Tuesday, March 26	-
8	<a href="#">Provide Feedback</a>	10 minutes	Friday, March 29	7:00 AM MT / 9:00 AM ET	Friday, May 4	6:00 PM MT / 8:00 PM ET

## TIMING OF BREAKTHRU PROGRAMS

All Future Proof Retreat Breakthru Programs will take place on March 25-27. If you're a Meetings Rep please ensure you will be available during all time slots.

START (MT)	END (MT)	MINUTES	MONDAY, MARCH 25	TUESDAY, MARCH 26
10:45 AM	11:00 AM	0:15	Meeting Slot #1	Meeting Slot #9
11:00 AM	11:03 AM	0:03	Transition time	Transition time
11:03 AM	11:18 AM	0:15	Meeting Slot #2	Meeting Slot #10
11:18 AM	11:21 AM	0:03	Transition time	Transition time
11:21 AM	11:36 AM	0:15	Meeting Slot #3	Meeting Slot #11
11:36 AM	11:39 AM	0:03	Transition time	Transition time
11:39 AM	11:54 AM	0:15	Meeting Slot #4	Meeting Slot #12
1:45 PM	2:00 PM	0:15	Meeting Slot #5	Meeting Slot #13
2:00 PM	2:03 PM	0:03	Transition time	Transition time
2:03 PM	2:18 PM	0:15	Meeting Slot #6	Meeting Slot #14
2:18 PM	2:21 PM	0:03	Transition time	Transition time
2:21 PM	2:36 PM	0:15	Meeting Slot #7	Meeting Slot #15
2:36 PM	2:39 PM	0:03	Transition time	Transition time
2:39 PM	2:54 PM	0:15	Meeting Slot #8	Meeting Slot #16



## 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.

## UNTIL MARCH 1

### ORGANIZATION ADMINS: ASSIGN MEETINGS REPS

(5 MINUTES)

#### YOU CAN DO THIS ON



DESKTOP



MOBILE APP

**1. If you're an Organization Admin you (or another Org Admin) must assign individuals from your company as Meetings Representatives (to take Hosted Meetings your company has purchased) by Friday, March 1 at 6:00 PM MT.**

- Individuals must be registered to attend Future Proof Retreat to be assigned as a Meetings Rep.
- We recommend having 1 Meetings Rep per 10 Hosted Meetings. So, if your company has purchased 30 Hosted Meetings, you should assign 3 or more Meetings Reps.
- Meetings Reps will be able to complete their profile from **Tuesday, February 20 to Friday, March 1**.

## FEBRUARY 20 – MARCH 1

### MEETINGS REPS: COMPLETE YOUR PROFILE

(10-15 MINUTES)

#### YOU CAN DO THIS ON



DESKTOP



MOBILE APP

**1. Meetings Reps: Start Your Profile on Tuesday, February 20, and complete it by Friday, March 1 at 6:00 PM MT. 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. We recommend Meetings Reps are available for all time slots.
- You can change your availability at any time from **Tuesday, February 20 to Friday, March 1 at 6:00 PM MT.**
- Share the love! Click Post on Social to tell your X followers and LinkedIn contacts that you're participating in Future Proof Retreat! While you're there, add your profile photo!
- Consider making an Announcement: Tell the thousands of Future Proof participants (including 300+ financial advisors) about your newly announced products, partnerships, funding, acquisitions, research and anything else!
- Organization Admins can edit and complete profiles on behalf of participants from your company (they can thank you later!).
- Check out the Org Admin Pro Tips at the end of these guidelines for more info.

**2. Registration Deadline! To participate in the Breakthru Meetings Hosted Program as a Meetings Rep, you must register (and be assigned as a Meetings Rep) before Friday, March 1 at 6:00 PM MT.**



## MAR 4 – MAR 8

### MEETINGS REPS: REQUEST MEETINGS

(30 – 90 MINUTES)

#### YOU CAN DO THIS ON



DESKTOP



MOBILE APP

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

- You should select ALL Hosted Financial Advisors, Wealth Management Execs, & 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 company has purchased**. E.g., if your company has purchased 10 Hosted Meetings, you should make at least 40 Hosted Meeting requests.
  - » Select everyone from a company you want to meet—your company won't have >1 Hosted Meeting scheduled with the same company.
  - » 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' meeting requests get scheduled first, before 'Interested' ones.
- You can also make Non-Hosted Meeting requests with Investment Managers, Wealthtechs, and other Financial Services Providers!
  - » Select everyone from a company you want to meet—you can have Non-Hosted Meetings with >1 person from the same company (but only once we've scheduled all possible meetings with unique companies).

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



## MAR 12 – MAR 15

### MEETINGS REPS: OPT IN TO REQUESTS

(UP TO 30 MINUTES)

#### YOU CAN DO THIS ON



DESKTOP



MOBILE APP

**1. Meetings Reps: 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.**

- 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.
- Opt-ins to requests from Hosted Attendees will default to Hosted Meeting requests.
- You won't have >1 Hosted Meeting scheduled with the same company.

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

**3. Availability Deadline! You can change your availability until Friday, March 15 at 6:00 PM MT.**

## MAR 18 – MAR 20

### MEETINGS REPS: ACCEPT YOUR MEETINGS

(<10 MINUTES)

#### YOU CAN DO THIS ON



DESKTOP



MOBILE APP

**1. On Monday, March 18 at 7:00 AM MT, you'll receive an email to review and accept each of your meetings. Please do this by Wednesday, March 20 at 6:00 PM MT. We promise, it won't take more than 10 minutes (if that!).**

- **You must accept all of your Hosted Meetings.** Hosted Meetings that aren't accepted will not be refunded to your company.
- You get meetings with people you selected who also selected you...so, not accepting meetings might disappoint others!
- You need to accept your own meetings--Org Admins cannot accept on your behalf.
- You should also accept your Non-Hosted Meetings (if any).
- If you don't accept a meeting by the deadline, that meeting won't get scheduled.



## MAR 21 – MAR 22

**MEETINGS REPS:  
ACCEPT ANY ADDITIONAL MEETINGS & CALENDAR INVITES**  
(<10 MINUTES)

**YOU CAN DO THIS ON**



DESKTOP



MOBILE APP

**1. Meetings Reps: 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 time slot.

**2. Meetings Reps: Accept Your Meetings Calendar Invites:** On **Friday, March 22 at 7:00 am MT**, you'll receive a calendar invite for each scheduled meeting. **YOU MUST ACCEPT all calendar invites THE SAME DAY by 6:00 pm MT**. 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](mailto: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 Retreat is enabling 5,000+ meetings!), and you should not reschedule Future Proof Retreat 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!

## MAR 25 – MAR 26

### ATTEND YOUR FUTURE PROOF MEETINGS!

#### 1. Meetings Reps Join Hosted Meetings. Meetings Reps must join all scheduled Hosted Meetings (and Non-Hosted Meetings, if any).

- Where are the meetings? All meetings are held in a dedicated Breakthru Meetings area, and each meeting is assigned a table number.
- How do Meetings Reps know where to go? They should check the Future Proof Retreat mobile app or their calendar invites for the assigned table number for each meeting. At the start of each scheduled meeting, they can proceed directly to the assigned table.
- When should Meetings Reps arrive? They should arrive at the Breakthru Hosted Meetings Program area a few minutes before their first scheduled meeting. There is no check-in required. If they have any questions, there will be a Q&A desk.
- What happens if the person they're meeting doesn't show up? Meetings Reps should give them 5 minutes and if they still have not joined, click the "Mark as No Show" button in the Future Proof Retreat mobile app.
- Can I add colleagues to my meeting? Yes, you can add any registered colleague who is available at the meeting time.

#### 2. Best Practices:

- Join each meeting on time and don't exceed the allotted 15 minutes for each scheduled meeting.
- Check the table number for each scheduled meeting--each meeting will be at a different table. There is a 3-minute transition time between each meeting.
- Download the Future Proof Retreat mobile app ahead of meetings. Meetings Reps can take notes and request follow-ups in the app.
- Meetings Reps should not:
  - » Contact any individual Attendee prior to Breakthru Hosted Meetings Program meetings in relation to Breakthru Hosted Meetings Program meetings, or use the confidential information we have provided at any stage of the program to reach out to participating individuals using non-program channels.
  - » Assume the Hosted Attendees they are meeting have prepared for the meeting. These individuals may have agreed to meet based solely on categories or search filters rather than any specific understanding of your company or solutions. Meetings Reps must assume the Hosted Attendees have no knowledge of your company or your products, and should be prepared to give a complete sales pitch during their 15-minute meeting as well as leave time for any Q&A.
- Bring any materials that cannot fit on the table (e.g., free standing structures and pop-up signage is not allowed) or leave any materials at the table after the meeting concludes.



**MAR 29 – APR 12**

**SUBMIT SURVEY FEEDBACK**

(5 MINUTES)

**YOU CAN DO THIS ON**



DESKTOP



MOBILE APP

**1. Help us help you! On Friday, March 29 at 7:00AM MT, each Meetings Rep will receive an email to provide feedback on their Hosted Meetings, the Breakthru Hosted Meetings Program and the overall event to help us improve Future Proof Retreat--please share your thoughts by Friday, April 12 at 8:00 PM MT.**

- Once Meetings Reps provide feedback, they can download a summary of their meetings, including their notes and contact details of who they met.
- Delays in providing feedback will delay refunds for any Hosted Meetings your company purchased that were not fulfilled.

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

## 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 company, 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 company 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.

### 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 company (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 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 company 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 company 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