

Blue Vault Bowman Alts Summit 2020

Product Forum Agenda Grand Ballroom II & III

Day:

Time:

Tuesday, March 10, 2020

Registration & Information desk	9:00 AM - 6:30 PM
Lunch	11:45 AM - 12:50 PM
Welcome to the Summit	12:55 PM - 1:15 PM
Panel Discussion, "Alts Electronic Business: A Discussion About Today's Challenges"	1:15 PM - 2:00 PM
Moderator: Angie Fisher, CIM Group	
Panelists:	
Justin Fay, BNY Mellon Pershing	
Sara Murphy, AIX	
Mike Pagano, Avantax	
Cheryl Wheeler, SS&C ALPS	
Doug Buce, Boing Dynamics	2:00 PM - 2:10 PM
ExchangeRight	2:10 PM - 2:30 PM
Broker Dealer/RIA Discussion	2:30 PM - 2:35 PM
Cottonwood	2:35 PM - 2:55 PM
Broker Dealer/RIA Discussion	2:55 PM - 3:00 PM
Networking Break	3:00 PM - 3:40 PM
Black Creek Group	3:40 PM - 4:00 PM
Broker Dealer/RIA Discussion	4:00 PM - 4:05 PM
Triton Pacific	4:05 PM - 4:25 PM
Broker Dealer/RIA Discussion	4:25 PM - 4:30 PM
Ashford Securities	4:30 PM - 4:50 PM
Broker Dealer/RIA Discussion	4:50 PM - 4:55 PM
Peachtree Hotel Group	4:55 PM - 5:15 PM
Broker Dealer/RIA Discussion	5:15 PM - 5:20 PM
Doug Buce, Boing Dynamics	5:20 PM - 5:30 PM
Broker Dealer/RIA Meeting	5:30 PM - 5:50 PM
Networking Reception	5:50 PM - 6:30 PM
Networking Dine-arounds	6:30 PM

Wednesday, March 11, 2020

Registration & Information Desk	7:00 AM - 6:30 PM
Networking Breakfast	7:00 AM - 8:00 AM
Doug Buce, Boing Dynamics	8:00 AM - 8:10 AM
A Discussion with The Bowman Law Firm	8:10 AM - 8:40 AM

Leitbox Portfolio Partners	8:40 AM - 9:00 AM
Broker Dealer/RIA Discussion	9:00 AM - 9:05 AM
CIM Group	9:05 AM - 9:30 AM
Broker Dealer/RIA Discussion	9:30 AM - 9:35 AM
Doug Buce, Boing Dynamics	9:35 AM - 9:40 AM
Networking Break	9:40 AM - 10:25 AM
Bluerock Real Estate	10:25 AM - 10:45 AM
Broker Dealer/RIA Discussion	10:45 AM - 10:50 AM
Pacific Oak Capital Group	10:50 AM - 11:10 AM
Broker Dealer/RIA Discussion	11:10 AM - 11:15 AM
Networking Break	11:15 AM - 11:30 AM
Carter Multifamily	11:30 AM - 11:50 AM
Broker Dealer/RIA Discussion	11:50 AM - 11:55 AM
Legendary Capital	11:55 AM - 12:15 PM
Broker Dealer/RIA Discussion	12:15 PM - 12:20 PM
Networking Lunch	12:20 PM - 1:20 PM
Round table Discussion	1:20 PM - 2:20 PM
Doug Buce, Boing Dynamics	2:20 PM - 2:30 PM
Panel Discussion: "Alts Electronic Business: A Discussion About Today's Solutions"	2:30 PM - 3:15 PM
Moderator: Richard Thoeny, Docupace	
Panelists:	
Tim Armenta, iCapital	
Sonny Cabral, DTCC	
Michael Page, Riskalyze	
Bill Robbins, WealthForge	
Networking Break	3:15 PM - 3:55 PM
Doug Buce, Boing Dynamics	3:55 PM - 4:00 PM
Inland	4:00 PM - 4:20 PM
Broker Dealer/RIA Discussion	4:20 PM - 4:25 PM
NexPoint	4:25 PM - 4:45 PM
Broker Dealer/RIA Discussion	4:45 PM - 4:50 PM
Owl Rock	4:50 PM - 5:10 PM
Broker Dealer/RIA Discussion	5:10 PM - 5:15 PM
Doug Buce, Boing Dynamics	5:15 PM - 5:25 PM
Broker Dealer/RIA Meeting	5:25 PM - 5:55 PM
Evening Break	5:55 PM - 6:05 PM
Networking Reception	6:05 PM - 6:35 PM
Networking Dine-arounds	6:35 PM

Thursday, March 12, 2020

Registration & Information Desk 7:00 AM - 2:00 PM

Networking Breakfast 7:00 AM - 8:15 AM

Doug Buce, Boing Dynamics	8:15 AM - 8:25 AM
"State of Advice Tech"	8:25 AM - 9:15 AM
Kyle Van Pelt, SS&C ALPS	
"State of Alts Performance"	9:15 AM - 9:40 AM
James Sprow and Luke Schmidt, Blue Vault	
Networking Break & Check-Out	9:40 AM - 10:25 AM
Doug Buce, Boing Dynamics	10:25 AM - 10:35 AM
Panel Discussion, "Managing Change in the Alternative Investment and Broker-Dealer Worlds"	10:35 AM - 11:25 AM
Moderator: Thayer Gallison, Ladenburg Thalmann Financial Services	
Panelists:	
Larry Lyons, Kalos Financial	
Jean Merriman, The Strategic Financial Alliance	
Mike Miller, Sigma Financial Corporation	
Doug Buce, Boing Dynamics	11:25 AM - 11:35 AM
Broker Dealer Meeting	11:35 AM - 12:30 PM
RIA Meeting	11:35 AM - 12:30 PM
Networking Lunch	12:30 PM - 1:30 PM
Conference Ends	1:30 PM

**agenda subject to change*