

Tuesday, September 22

8:15 – 9:15 a.m.	Breakfast in the Exhibit Hall									
9:30 – 10:30 a.m.	A Founders' Fireside Chat: Heritage, Leadership, and the Future of Finance									
10:30 – 11:00 a.m.	Break in the Exhibit Hall									
Time	AI & Automation	Alternative Investments: Hedge	Alternative Investments: Private Markets	Asset Management: Operations	Asset Management: Products & Strategy	Enterprise Technology	Health	Insurance & Lending	Retirement	Wealth Management
11:00 – 11:45 a.m.	Interactive Roundtables: Practitioner Conversations on Agentic Automation Session Two	Building the Next Generation Post Trade Utility: AI, Data Quality, and the Path to Zero-Defect Operations	Retail Alternatives at Scale: Bridging Product Innovation with Operational Reality	Friction-Free Trading: Real-Time Control for Modern Markets	How AI & Data Are Changing Asset Management Distribution	The Digital Immune System: Cyber Resilience in the AI Era	Go-Live or Go-Down: Lessons from Operational Readiness	What Senior Insurance Leaders Wish They'd Known Before Scaling Complex Assets	The Global Retirement Landscape: Trends, Innovation, and What's Next	ETFs are Everything Active Strategies, Income Innovation, and New Markets
12:00 – 12:45 p.m.	From Vision to Value: Chorus Processes, Reimagined for the Agentic Era	Breaking New Ground New SS&C Innovations in Servicing Alternatives	The Continued Rise of Hybrids: Operational and Strategic Implications	The Data Bottleneck: Solving the Hidden Challenges of Market and Portfolio Data	Expanding Access to Alternatives in 401(k)s and Target Date Strategies	Asset Management 3.0: DeFi, Blockchain, and the On-Chain Revolution	Inside the AI Factory: Building Intelligence for Healthcare-Specific Workflows	The Insurer's Edge: Unlocking Value in Residential Whole Loans	Transforming 401(k) Plans: Income is Now the Outcome	Building Continuity Through Succession Planning
12:45 – 1:45 p.m.	Lunch									
1:45 – 2:15 p.m.	Chorus Best Practices & Business Value: A Customer Panel	Benchmarking and Trends Across Hedge Fund Administration	Caught in the Middle: The Operational Gap Facing Today's Mid-Market Private Equity Firms	Future-Ready Investment Operations: How Today's Challenges are Shaping SS&C Advent's Roadmap	One Model, Global Reach: EMEA & APAC Insights on Fund Distribution	Strategic Tech Leadership: M&A, Consolidation, and the 'Moat'	Litigation-Proof Operations: What Claims Systems Must Do to Protect the Plan	The Insurance Investment Platform Decision: When, Why, and How Firms Re-Evaluate	Rethinking Retirement: Innovation, Alternatives, and AI in Modern Retirement Plans	Inside Investment Management Services Models, UMAs, and Tax Efficiency

Time	AI & Automation	Alternative Investments: Hedge	Alternative Investments: Private Markets	Asset Management: Operations	Asset Management: Products & Strategy	Enterprise Technology	Health	Insurance & Lending	Retirement	Wealth Management
2:30 – 3:00 p.m.	Chorus - Art of the Possible: The full Portfolio, Live and in Action	Establishing a Single Source of Truth for Hedge Fund Tax Automation	Stronger Controls, Faster Growth: Rethinking Operational Risk in Private Markets	Evolving Products, New Markets, New Risks: Keeping Compliance in Lockstep with Growth	Tokenization and Digital TA: From Experiment to Infrastructure - Why Funds and Firms Can't Ignore What is Next	The Maturity Journey: Scaling Tech Leadership Across the Enterprise	The Invisible Work of Adjudication : Turning Operational Data into Executive Insight	How Investment Strategy Shifts Are Stress-Testing Insurance Operations	Leading the Human Side of Operational Change for the AI Frontier	In Focus Key Black Diamond Capabilities
3:15– 3:45 p.m.	Chorus Roundtable: Practitioner Conversations	The Geneva Exchange Peer-to-Peer Roundtables	The LP Playbook Is Changing: How GPs Win Allocations in 2026 and Beyond	Hybrid Operating Models: Investment Operations in a Higher-Velocity Market	SMA and UMA Personalization at Scale: Growth Without the Growing Pains	The Feedback Loop: Customer-Driven Innovation and Pain Point Resolution	Build Your AI Value Realization Plan: A Hands-On Workshop	Managing Investment Complexity Without Increasing Operational Risk	Retirement Fraud in the Real World: Where Plans, Participants, and Processes Are Vulnerable	M&A in Practice From Acquisition to Integration
3:45– 4:15 p.m.	Break in the Exhibit Hall									
4:15 – 5:00 p.m.	Closing General Session: Applied AI: Build, Operate and Thrive with SS&C									
6:00 – 9:00 p.m.	Closing Night Dinner Event at JW (National Act Entertainment TBC)									

Sessions Descriptions

Monday, September 21

9:00 – 9:45 AM General Session

- Welcome and Nasdaq Opening Bell Ringing

Track: General Sessions

We're kicking off this year's conference in a way very few ever get to experience. Guests will participate in the Nasdaq Opening Bell ringing alongside Adena Friedman, CEO of Nasdaq, and SS&C's CEO and founder, Bill Stone. This is a once in a lifetime opportunity. The Opening Bell marks the start of the global trading day and is seen by investors, clients and partners around the world.

10:15 – 11:00 AM Breakout Sessions

- **WorkHQ in Action: The Move to Orchestrated Operations**

Track: AI & Automation

WorkHQ brings people, AI agents, digital workers, and systems into one governed system of work. In this session, we'll share the momentum building since launch, and what we've learned running WorkHQ inside SS&C as customer zero. We'll also be joined on stage by customers who'll share their own experience. You'll see the agentic playbook for moving from standalone agents to orchestrated operations, where early adopters are seeing the biggest impact, and how WorkHQ acts as the connective tissue across your existing automation, AI, and human workflows.

- **The Private Credit Story | Cutting Through the Headlines**

Track: Alternative Investments: Hedge

Private credit continues to dominate market headlines, as its decades-long growth has positioned it as a significant pillar of global capital markets. This session brings together industry leaders to discuss the evolution and operational complexities of managing this asset class. We will explore the intersection of investment strategy and modern technology, highlighting how firms can scale efficiently while navigating market uncertainties.

- **From Tailwinds to Tactics: Navigating the New Private Markets**

Track: Alternative Investments: Private Markets

For much of the last decade, private markets benefited from a highly supportive backdrop—low rates, ample liquidity, and steady multiple expansion driving strong returns. Today, higher capital costs, constrained exits, and increased scrutiny have reshaped the landscape. Yet the opportunity has not diminished—if anything, it has become more compelling. As the market shifts from tailwinds to a more demanding cycle, the sources of returns are shifting. Join us to explore what this next cycle will reward—and what capabilities will differentiate the winners from the rest.

- **Ready for What's Next: How Asset Managers Can Thrive Amid Change**

Track: Asset Management Joint Track

From market volatility and margin pressure to digital disruption and shifting investor priorities, asset managers face a complex and constantly evolving environment. This session takes a step back to examine the big picture—the forces shaping the future of asset management today—and the strategic choices that matter most for all of us in response. Industry perspective will connect macro trends with actionable responses, showing how thoughtful use of technology, paired with deep industry expertise, can help firms not just adapt, but lead. Senior SS&C leaders from Advent, GIDS and GlobeOp will share how they are seeing these trends play out at client firms and preview the developments that clients will learn more about at Deliver. With the right SS&C partners, platforms, and perspective, asset management clients are well-positioned to navigate uncertainty and build lasting advantage.

From Pilot to Product: Embedding AI to Deliver Real Value in Wealth & Investment Management Products

Track: Enterprise Technology

The promise of AI in financial services is well established — but the proof is in the product. This session moves beyond the headlines to explore how AI is being embedded directly into solutions built for wealth and investment managers, driving outcomes that matter for advisors, asset managers, and retirement plan providers. Attendees will walk away with a clear view of specific use cases being delivered across our flagship products today, and a practical lens for evaluating where embedded AI can create the most meaningful impact in their own organizations.

- **The \$1B Question: Can Your Platform Survive Full Line-of-Business Expansion?**

Track: Health

Health plans often grow by adding new lines of business—moving from Medicaid to Medicare to the Marketplace—only to discover their underlying platforms were never designed to scale with that complexity. This session explores where legacy and semi-modern stacks break down under regulatory, operational, and financial pressure, and why modular modernization has become essential. Attendees will gain a practical framework for evaluating platform resilience before growth turns into operational risk.

- **The State of Insurance Investment Operations in 2026**

Track: Insurance & Lending

This session provides a market-level view of the pressures shaping insurance investment operations today, including increasing asset complexity, heightened regulatory scrutiny, cost constraints, and evolving organizational demands. It sets the context for the broader track by highlighting the structural challenges that are influencing how insurers currently operate and how those models may need to evolve over time.

- **The Industry Landscape: Consultant Point of View**

Track: Retirement

The year has brought about many changes and opportunities in the retirement industry. The inclusion of cryptocurrencies, the use of alternative investments as investment options in the 401(k), the introduction of several new savings vehicles for Americans and the conversation around unifying how the retirement programs operate around the world. This panel will discuss how all of these initiatives are playing out in the marketplace today.

- **Building What's Next in WealthTech | The Black Diamond Product Roadmap**

Track: Wealth Management

Gain insight into Black Diamond's direction as product leaders present upcoming features, integrations, and platform enhancements that support growth, efficiency, and the overall client experience. You'll discover how ongoing innovation will enable you to meet evolving client expectations and industry requirements. This session will provide practical guidance on how our roadmap aligns with the priorities of our wealth management and trust clients and outlines what to expect in the coming months.

11:15 – 12:00 PM Breakout Sessions

- **Inside WorkHQ: A Platform Deep Dive and Live Demonstration**

Track: AI & Automation

As AI starts taking action, the challenge shifts from intelligence to execution. This session opens up WorkHQ, SS&C Blue Prism's new operating layer for agentic work, with a live demonstration of the platform in action. Building on the momentum and use cases from the earlier session, we'll go under the hood: how WorkHQ orchestrates agents, digital workers, and people across end-to-end processes; how governance, auditability, and human-in-the-loop decisioning are built into the platform; and how it works with the broader SS&C application ecosystem, including Chorus. You'll leave with a concrete understanding of how the platform works and what it takes to deploy it.

- **Separately Managed Accounts: Key Considerations for Adoption**

Track: Alternative Investments: Hedge

As Separately Managed Accounts (SMAs) continue to grow, hedge fund managers are having to rethink how they deliver customization at scale. This session examines how SMAs differ operationally from commingled vehicles, the real-world technology challenges managers face when adopting them, and the forces driving investor demand. We'll explore the key considerations managers and clients should consider before expanding their use.

- **Private Credit 2026: What CFOs Are Watching Now**

Track: Alternative Investments: Private Markets

In a new survey conducted by SS&C and PEWire, we asked CFOs at Private Credit Funds what areas of lending they expect to monitor most closely over the next 6-12 months. In this session, attendees will get an exclusive preview of the unpublished survey results and explore the key themes shaping the private markets landscape. Designed for private markets managers, this session will highlight actionable insights to help firms position themselves for the year ahead - from capital allocation, investment trends, and risk appetite to the downstream operational and fund administration implications; and what's shaping reporting, valuation, liquidity management, and investor transparency in the year ahead.

- **How the Fraudsters Are Winning - and Where Firms Are Exposed**

Track: Asset Management: Operations

Fraud is no longer a series of isolated incidents. It is a coordinated, adaptive threat that exploits gaps across systems, processes, and human behavior. While organizations continue to invest in controls, fraudsters are evolving, leveraging social engineering, exploiting digital and physical access points, and using increasingly sophisticated tactics to bypass traditional defenses. This session takes a direct and unfiltered look at how fraud is actually occurring today. Rather than focusing on theory, it will break down where controls are failing in practice, from authentication weaknesses and process breakdowns to gaps between front-line operations and back-end systems. Attendees will gain insight into the real-world dynamics of modern fraud, including how attacks move across channels, why well-designed controls still fail, and where organizations are most vulnerable. The discussion will also explore what is working, highlighting how firms are beginning to shift toward more layered, adaptive approaches to fraud mitigation that balance security with client experience.

- **The Voice of the Distributor**

Track: Asset Management: Products & Strategy

Join us for a fireside chat with a senior executive from a leading wealth management firm, offering asset managers insight into today's intermediary landscape. They will be interviewed by SS&C's Lee Kowarski about a variety of topics, including trends in advisor behavior, products, education, technology, and more.

- **The AI-Powered Engine: Automating Operations and the SDLC**

Track: Enterprise Technology

A deep dive into how AI is transforming both business operations and software development. From purpose-built AI that classifies high-volume email and generates business processes in Chorus, to Claude-powered 'Agentic Programming' that accelerates the software development life cycle (SDLC). In this session, we will share how SS&C is leveraging AI to further automate operations and accelerate the software development life cycle while managing risk.

- **From Call Center to Intelligence Engine: Turning Every Interaction into Actionable Insight**

Track: Health

Most health plans still view the call center as a cost center or, at best, a service function. In reality, it is one of the richest sources of real-time operational and member insight. This session reframes the contact center as an early-warning system for churn, quality issues, and compliance gaps. Learn how leading plans use interaction data to drive predictive interventions, improve retention, and elevate member experience.

- **Singularity: The Insurance Investment Operations & Accounting Platform for All Asset Classes**

Track: Insurance & Lending

This session provides a high-level overview of SS&C Singularity for insurers evaluating modern investment operations platforms. The focus is on the core problems insurers are looking to solve and the outcomes they expect to achieve, including improved efficiency, transparency, and operational scalability.

- **News From the Hill | A Perspective from Davis Harman**

Track: Retirement

Chris Gaston and Mike Hadley from Davis Harman deliver the latest updates on impactful legislative and regulatory proposals in Washington DC, other insights that might impact our industry.

- **From Exploration to Execution | AI in Practice**

Track: Wealth Management

In this session, Tim Welsh of Nexus Strategy will explore practical AI applications, from emerging workflow enhancements to broader strategic firm vision. Wealth management leaders will discuss how they are implementing AI within their organizations, and they'll share practical use cases, lessons learned, and strategies for aligning AI initiatives with business objectives. The discussion will address workflow improvements, decision support, and evolving firm strategies. Attendees will gain practical insight into current successes and how firms are advancing AI in a dynamic environment.

1:30 – 2:15 PM Breakout Sessions

- **The Agentic Reality Check: How Work Gets Rewritten**

Track: AI & Automation

Agentic AI isn't just making automation smarter — it's transforming how organizations design, coordinate, and govern work. This session moves beyond vision to explore the operational implications of agentic execution. We'll examine where traditional workflows and automation approaches begin to break down, how execution and accountability models evolve in outcome-driven work, the organizational shifts required to coordinate humans, automation, and AI agents, and the emerging design principles behind modern systems of work.

- **From Automation to Advantage: Transforming Fund Admin with AI and Operational Discipline**

Track: Alternative Investments: Hedge

This session will explore how SS&C is moving beyond basic automation to build true competitive advantage through AI and disciplined operating models. Leaders will discuss how agentic AI, clean data architecture, and well-designed processes come together to elevate accuracy, accelerate turnaround times, and enhance the client experience.

- **The Power of Secondaries: Shaping Liquidity in Private Markets**

Track: Alternative Investments: Private Markets

In a volatile environment, secondaries have emerged as a strategic lever of control, enabling investors and managers to shape, rather than react to, private market liquidity dynamics. In this session, industry leaders will unpack the mechanics behind liquidity creation in the expanding global secondaries market, from key structural drivers of growth to the evolving operational capabilities required to execute effectively and unlock value across an increasingly complex and dynamic private markets landscape.

- **Building a Data-First Blueprint for Intelligent Investment Operations**

Track: Asset Management: Operations

AI is only as valuable as the data driving it; it must be accurate, accessible, and ready for real operations. For asset managers, that means building a data foundation that can scale with evolving regulatory demands, operational complexity, and institutional growth - without sacrificing control, transparency, or day-to-day safeguards. In this session, we'll explore how modern data architecture can reshape investment operations and create a single operational picture. We'll showcase how platforms like Genesis can turn fragmented data silos into actionable insights and serve as the blueprint for your AI strategy. We'll also unveil a sneak-peek at SS&C Advent's Agentic AI, built for regulated financial environments, where explainability, governance and trust matter as much as innovation.

- **ETF Innovation: Product Evolution, Globalization Opportunities, and Faster Paths to Market**

Track: Asset Management: Products & Strategy

As the ETF landscape continues to evolve, innovation is reshaping how products are structured, launched and distributed. This session will explore what has changed over the past year, including the growing adoption of ETFs as a share class and the increasing use of structures like 351 exchanges and mutual fund-to-ETF conversions (368). At the same time, new entrants enabled by incubator trusts and turnkey advisory platforms are bringing strategies to market more quickly and cost-effectively than ever before – lowering barriers to entry and fueling active distribution strategies. These developments are also enhancing the investor experience through improved access, transparency and product flexibility. Concurrently, positioning ETFs are positioned as a key entry point for non-U.S. managers seeking to access and scale in the U.S. market, accelerating the globalization of asset management and driving a new wave of product innovation.

- **The Uncomfortable Truth About Data Strategies in Financial Services**

Track: Enterprise Technology

Why AI ambition is outpacing data foundations and what financial services leaders must fix to scale safely, compliantly, and competitively. Financial services organizations are investing heavily in AI, yet many initiatives stall before reaching meaningful scale. The challenge is no longer models, talent, or cloud adoption, but rather the data foundations required to support AI in production. In this panel, senior leaders will examine the uncomfortable data related realities undermining AI, analytics, and automation, including fragmented data estates, outdated architectures, and the underutilization of unstructured data.

Panelists will explore where AI efforts most often falter, why architectures designed for reporting and periodic oversight are no longer sufficient, and whether converged, trusted data access is becoming essential to support real time decisioning, automation, and risk management as regulatory and business demands intensify. Attendees will leave with clarity on why AI initiatives keep stalling, where data strategies are quietly limiting value, and how financial services leaders can prioritize the few decisions that will progress their data strategy.

- **From Configuration to Orchestration: The Evolution of Healthcare Core Platforms**

Track: Health

Static configuration once defined flexibility in healthcare systems—but it is no longer sufficient. This session explores the shift toward orchestration, workflow automation, and event-driven architectures that allow plans to respond dynamically to change. Learn how modern platforms enable coordinated processes across claims, care management, compliance, and analytics—without hard-coding complexity.

- **NAIC Regulatory Priorities Every Insurer Should Be Planning for Now**

Track: Insurance & Lending

This session explores current and emerging NAIC regulatory priorities and how they are influencing insurer reporting, controls, and operational readiness. The discussion will focus on practical implications for insurers as regulatory expectations continue to evolve.

- **Scaling Personalized Financial Wellness through Generative AI**

Track: Retirement

As the financial services landscape shifts with the adoption of AI, the mandate for plan sponsors and providers is clear: move beyond generic education toward hyper-personalized guidance. This session explores how Generative AI (GenAI) is transforming the participant journey from a fragmented series of touchpoints into a seamless, lifelong aspirational experience.

Attendees will gain a dual perspective on the current state of the industry: Research-driven Insights: We'll share the latest data on GenAI's impact on participant behavior, showcasing how AI-driven interventions measurably improve engagement rates and savings outcomes; Real-world Application: Hear from an AI-forward client who is "ahead of the curve." They will share their firsthand experience integrating GenAI into their participant ecosystem and the tangible results they've seen in employee satisfaction and financial readiness. Join us to discover how GenAI can flex far beyond the back-office applications – and be leveraged as a powerful engine for driving meaningful participant outcomes and scaling expert guidance for every employee, regardless of their starting point.

- **From Carbon Comes Clarity | The Power of Black Diamond AI**

Track: Wealth Management

Discover how Black Diamond AI empowers wealth management firms through embedded intelligence and automation. This session features a walkthrough of key capabilities, such as faster insights, streamlined workflows, and the ability to query your data in natural language. We'll explore how AI works today and where it's headed, including the agentic capabilities on the horizon that will change how wealth management firms deliver for their clients. Whether you're a current client or new to the platform, you'll walk away with a clear picture of what's possible.

2:30 – 3:15 PM Breakout Sessions

- **Interactive Roundtables: Practitioner Conversations on Agentic Automation | Session One**

Track: AI & Automation

Four parallel small-group discussions running side by side, each led by an SS&C Blue Prism expert. Pull up a chair at the table that matches what you're working through right now. These are working conversations, not presentations — practitioners comparing notes, sharing what's actually playing out in their operations, and asking the questions you don't get to ask in a keynote. Honest dialogue, real problems, and takeaways you can put to work on Monday.

Table 1 — The Governance Question: What Keeps Your Risk & Compliance Team Up at Night

Table 2 — Orchestration in the Real World: Making Agents, Systems & People Actually Work Together

Table 3 — Pilot Purgatory: How to Escape It

Table 4 — Designing Work for a World of Agents: The Operating Model Reset

- **From the Engine Room | Fine Tuning Your Operations with the Geneva Roadmap**

Track: Alternative Investments: Hedge

Join our Geneva team as we explore this year's key projects and the roadmap ahead. Focusing on future-proofing your business, we'll provide a deep dive into recent enhancements across accounting, platform, and user experience designed to drive greater velocity across your entire operational workflow. As always, we will host an Ask the Experts session — come prepared to put us on the hot seat!

- **Real-World Approaches to Solving Alternatives Data and Operational Challenges**

Track: Alternative Investments: Private Markets

In this session, we will bring operational innovation in the alternatives space to life through practical, real-world examples. We'll explore how common data and operations challenges across alternative investments are tackled from concept to execution. Don't miss this chance for an inside look at what came together, and the measurable impact on efficiency, accuracy, and performance.

- **Lessons From the Field: How to Modernize Your Tech Stack Without Breaking What Works**

Track: Asset Management: Operations

Modernizing investment operations isn't one revolutionary milestone — it's a deliberate evolutionary journey. In this session, you'll hear directly from one of our asset manager clients as they share their approach to modernization: what prompted the change, how they managed it over time, and how they balanced progress with operational continuity.

The conversation will focus on the key decisions and lessons learned along the way, the tangible benefits they unlocked. They'll talk about how SS&C Advent's Genesis platform has supported this evolution and laid the groundwork for increased automation and intelligence over time. Whether you are in the early stage of modernization or refining your existing operating model, this session offers practical insights grounded in real-world experience.

- **From Innovation to Execution: Managing Non-Traditional Products at Retail Scale**

Track: Asset Management: Products & Strategy

This session brings together leaders across broker/dealers, asset managers, and retail alternatives to explore how operating models must adapt to rapid industry change. As product innovation accelerates—through vehicles like ETFs, CITs, and tokenized assets—firms are facing increasing pressure to modernize infrastructure, enhance data transparency, and improve scalability. Participants will engage in a forward-looking discussion on key industry trends, including the migration from mutual funds to ETFs, the rise of retail alternatives, and the early impact of tokenization on fund structures and servicing. The session will also focus on development priorities with the DTCC, evolving client support models, and how to better align service delivery with client expectations in a more complex ecosystem. Through a collaborative dialogue, attendees will identify shared challenges, uncover opportunities for operational efficiency, and define practical next steps to support innovation while maintaining strong governance and service quality.

- **The Modern GP Stack: Inside SS&C's Ecosystem**

Track: Enterprise Technology

Today's GPs are under increasing pressure to move faster, operate with greater transparency, and deliver stronger returns across every stage of the fund lifecycle. Disconnected tools and manual processes are no longer sustainable in a market that demands precision, control, and real-time insight. This track explores how the SS&C's ecosystem brings together deal execution, fundraising, investor communications, and portfolio management into a single, connected experience. Learn how leading firms are modernizing their technology stack to streamline workflows, enhance collaboration, and unlock greater value. Join us to discover how a unified approach can help GPs reduce complexity, improve engagement, and ultimately drive better investment outcomes.

- **Compliance as Architecture: Embedding Regulatory Readiness into Core Platforms**

Track: Health

Too many organizations treat compliance as a downstream activity—reacting to regulatory change instead of engineering for it. This session examines how compliance can be embedded directly into core platforms through controls, auditability, and reporting by design. Attendees will walk away with a clearer understanding of how to move compliance upstream, reducing risk while increasing organizational agility.

- **Insurance Lending: Navigating New Rules and Reporting**

Track: Insurance & Lending

Join us in a timely discussion about what's changing in regulatory and reporting requirements for insurance lenders. We'll cover recent developments including in force-placed insurance practices and oversight, evolving CMBS investor reporting expectations, and updates to RBC and statutory reporting. The discussion will focus on how these developments are impacting portfolio oversight data transparency, and capital treatment, as well as the operational implications for insurers. Attendees will gain practical insights into aligning compliance, reporting and risk management practices while positioning their portfolios to adapt to ongoing regulatory change.

- **The Longevity Economy and the Future of Retirement Planning**

Track: Retirement

As life expectancy rises and the ability to live longer, healthier lifestyles continues, the longevity economy is transforming how individuals plan, save and spend in retirement. This discussion will focus on the current shift underway and how it impacts the products, features and services you need when considering retirement planning. This will include emerging financial models that consider extended time horizons; financial resilience in an era of longer and more active retirements; healthcare planning; how technology can and will enable the requirements of this sophisticated shift; and the role of the Advisor in providing guidance and information.

- **From Hard Problems to Hidden Value | Administering Unique Assets in Modern Trust Platforms**

Track: Wealth Management

Unique assets are becoming more important in modern trust portfolios. This panel explores how firms manage assets such as real estate, mineral rights, and closely held entities while maintaining oversight and reporting. Panelists will discuss operational challenges, valuation, and strategies to improve transparency and efficiency. Attendees will learn how leading organizations use technology and process improvements to better support clients and differentiate their services.

3:45 – 4:30 PM Breakout Sessions

- **Governance in a World of Agents: Financial Services Perspectives**

Track: AI & Automation

As AI systems take on more autonomous work, governance shifts from policy to architecture. In financial services, control, auditability, and accountability must be designed into agentic systems from day one — not bolted on later. This session examines how organizations should think about governing agentic execution: what governance actually looks like in agentic systems, how customers maintain oversight and auditability, the common control gaps to avoid, and why well-designed governance enables speed rather than creating drag. We'll explore where traditional controls break down and how modern systems of work enable progress without compromising compliance or trust.

- **The Dual Role Dilemma | Bridging the Loan Agent and Investor Operational Disconnect**

Track: Alternative Investments: Hedge

To compete in today's credit markets, firms need to rethink operating models. Leveraging a unified platform that combines loan agency workflows with portfolio, fund, and investor accounting can fundamentally enhance your operations. Join this session to learn more about Geneva Loan Agency and how operational excellence can be your competitive differentiator.

- **Real Assets, Real Complexity: Navigating a Changing Market**

Track: Alternative Investments: Private Markets

Real assets continue to attract significant capital as investors seek income, inflation protection, and long-term stability. But behind the growth lies increasing complexity across valuations, fund structures, and reporting expectations. This session explores the key trends shaping real estate, infrastructure, and energy investing, and the implications for today's finance leaders. Industry experts will discuss how managers are navigating operational challenges, enhance transparency, and build scalable fund accounting and data frameworks. Learn how leading firms are supporting increasingly sophisticated strategies in a market defined by heightened scrutiny, evolving investor demands, and a more data-driven operating environment.

- **Preparing for Scrutiny: AI and Regulatory Readiness for Asset Managers**

Track: Asset Management: Operations

As financial services firms expand their use of AI, regulators are increasing scrutiny through the lens of securities regulation, data privacy, and governance. It's not a question of whether firms need to be ready, but how they can prepare. In this Advent session, hear from our panel of industry experts as they discuss what regulatory readiness looks like in the age of AI. We will explore key considerations such as auditability, discoverability, data privacy, and governance, as well as what firms should be thinking about as the AI train keeps rolling and gets more embedded in day-to-day operations.

- **Converting Alternative Fund Structures: From 3(c)(7)s to Interval Funds and Bonus Share Classes**

Track: Asset Management: Products & Strategy

Fund sponsors are increasingly exploring structural conversions to enhance flexibility, liquidity, and investor access within alternative investment strategies. This session will examine how conversions across structures such as 3(c)(7) vehicles, interval funds, and preferred or bonus share classes can support evolving product and distribution strategies. Industry experts will discuss key considerations around liquidity, investor eligibility, and regulatory requirements, as well as operational implications and best practices for successful implementation.

- **Agentic Workflows: The Future of Autonomous Business Logic**

Track: Enterprise Technology

Workflows are evolving from static paths to dynamic, agent-led processes. This session examines how 'Agentic' plugins allow business users to orchestrate complex tasks and how the data platform ensures data meets every decision natively through AI-powered agents.

- **Turning Digital Quality Measures into Competitive Advantage**

Track: Health

With NCQA and CMS advancing digital quality measures, health plans face increasing pressure to modernize data and interoperability. This session breaks down what DQMs demand and how to assess readiness across data exchange, validation, and reporting. Attendees will leave with a clear framework to align stakeholders, prioritize next steps, and accelerate execution.

- **Preparing Operations for Insurance-Related Regulatory, Accounting, and Data Scrutiny**

Track: Insurance & Lending

This session focuses on how insurers and insurance-focused asset managers are preparing for increased scrutiny from regulators, auditors, and internal risk teams. Topics include data alignment, reporting integrity, and the operational adjustments firms are making to meet rising expectations.

- **Advisors at the Center: How Retirement Is Rewiring Around Advice, Access and Choice**

Track: Retirement

As retirement platforms evolve, the role of the advisor is being fundamentally redefined. What was once a tightly controlled, plan-centric model is giving way to more flexible, participant-driven experiences—where advice, technology, and data flow more freely across the retirement lifecycle. This panel explores how advisors are increasingly embedded earlier, deeper, and more holistically into retirement outcomes. Panelists will discuss how expanded access, improved data connectivity, and evolving fiduciary expectations are reshaping advisor engagement—inside plans, outside plans, and everywhere in between. Rather than focusing on any single delivery model, the conversation will center on what this shift means for advisors, recordkeepers, sponsors, and participants alike—and how firms can prepare for a future where advice is no longer optional, but foundational.

- **Women in Wealth | Influence and Impact**

Track: Wealth Management

Women are playing an increasingly important role in shaping the future of wealth management. This panel features female leaders from wealth management firms and trust companies who will share their career experiences, perspectives on business growth, and approaches to serving a changing client base. Their discussion will cover leadership, client engagement, and strategies for adapting to evolving expectations.

Tuesday, September 22

9:30 – 10:30 AM Keynote Session

- **A Founders' Fireside Chat: Heritage, Leadership, and the Future of Finance**

Track: General Sessions

SS&C Technologies marks its 40th anniversary this year. Dimensional Fund Advisors marks its 45th. In this fireside chat, founders Bill Stone, CEO and Chairman, SS&C Technologies and David Booth, Chairman, Dimensional Fund Advisors, reflect on the lessons learned building their firms, what has changed in financial services, and where they see things heading next. David will share insights from his new book *Stay Calm: Learn to Embrace Uncertainty in Investing and Life*.

11:00 – 11:45 AM Breakout Sessions

- **Interactive Roundtables: Practitioner Conversations on Agentic Automation | Session Two**

Track: AI & Automation

Four parallel small-group discussions running side by side, each led by an SS&C Blue Prism expert. Pull up a chair at the table that matches what you're working through right now. These are working conversations, not presentations — practitioners comparing notes, sharing what's actually playing out in their operations, and asking the questions you don't get to ask in a keynote. Honest dialogue, real problems, and takeaways you can put to work on Monday.

Roundtable Session Two:

Table 1 — When Things Go Wrong: Hallucinations, Risk & the Regulator's Phone Call

Table 2 — Beyond the Demo: What "Production-Ready" Actually Means

Table 3 — Customer Zero: What We've Learned Running WorkHQ Ourselves

Table 4 — Building the Business Case: Where Value Lands & What It Costs to Get There - Beyond the pilot ROI deck

- **Building the Next Generation Post Trade Utility: AI, Data Quality, and the Path to Zero-Defect Operations**

Track: Alternative Investments: Hedge

Discover how AI and high-quality data are transforming the post trade ecosystem. This panel brings together industry leaders to explore the next generation post trade utility—one built on intelligent automation, predictive analytics, and zero-defect operations. Learn how firms are reducing cost, eliminating friction, and strengthening resilience as they move toward a fully digital, self-healing post trade future.

- **Retail Alternatives at Scale: Bridging Product Innovation with Operational Reality**

Track: Alternative Investments: Private Markets

As retail alternatives move from innovation to scale, fund managers face increasing pressure to align product design with operational execution across both traditional and private market structures. Panelists will examine the evolving role of transfer agency, the convergence of servicing models across fund types, and strategies for managing data, distribution, and investor experience. Join us for a practical look at how leading organizations are simplifying operations, enhancing the investor experience, and building scalable platforms to support the next phase of retail alternative growth.

- **Friction-Free Trading: Real-Time Control for Modern Markets**

Track: Asset Management: Operations

As investment managers scale new strategies, asset classes, and regulatory obligations, many are reaching the limits of legacy OMS platforms built for overnight processing and post-trade controls. These systems still execute trades well, but struggle to deliver real-time risk visibility, adaptable controls, and the operating leverage today's firms require. The challenge isn't whether compliance exists, but that the governance is reactive and disconnected from how investment decisions are made.

This session explores what a modern trading and compliance operating model looks like when control is embedded directly into the trading lifecycle. We'll examine how real-time, shared intelligence, across portfolio managers, traders, and compliance teams enables intraday visibility and flexible controls that extend beyond regulatory rules to firm-specific mandates and risk tolerances. If your current OMS feels like a constraint, this session offers an executive-level view of how SS&C Advent's architectures, like Genesis, can replace legacy OMS systems—reducing friction, improving agility, and enabling confident decision making at scale.

- **How AI & Data Are Changing Asset Management Distribution**

Track: Asset Management: Products & Strategy

Hear from the heads of data and analytics at leading asset managers as they discuss how distribution has evolved as data has become more pervasive. From modern approaches to advisor segmentation to more intelligent opportunity targeting to the incorporation of artificial intelligence, learn about cutting edge approaches to sales and marketing.

- **The Digital Immune System: Cyber Resilience in the AI Era**

Track: Enterprise Technology

In a world of evolving threats, static security is no longer enough. Learn how to build a 'digital immune system' using AI to detect and respond to threats in real-time. We will also cover modernizing business continuity and disaster recovery and evolving supplier governance for a more resilient enterprise.

- **Go-Live or Go-Down: Lessons from Operational Readiness**

Track: Health

Claims platform migrations are among the most complex events a health plan can face—and the margin for error is slim. Drawing from real-world go-live events such as plan year changes and project implementations, this session highlights what most often breaks during go-live. Learn how command-center models, early warning systems, and disciplined execution can make the difference between stabilization and disruption.

- **What Senior Insurance Leaders Wish They'd Known Before Scaling Complex Assets**

Track: Insurance & Lending

This session shares lessons learned from insurers that have expanded into more complex asset classes and encountered unexpected operational, governance, and reporting challenges. It will highlight what tends to be underestimated early on and what becomes critical as portfolio complexity increases.

- **The Global Retirement Landscape: Trends, Innovation, and What's Next**

Track: Retirement

The retirement landscape is more interconnected than ever. This panel brings together global experts to explore what's shaping retirement systems worldwide. From Australia's superannuation model to evolving regulatory frameworks and emerging market trends. Whether you're evaluating international expansion, looking to apply global best practices, or simply seeking a broader view of the retirement market, this session will deliver practical insights and fresh perspectives.

- **ETFs are Everything | Active Strategies, Income Innovation, and New Markets**

Track: Wealth Management

Trends are reshaping how ETFs span asset classes, extend across wealth management mandates, and reach retirement and insurance markets. This session examines the current context for ETF innovation, from the boom in active issuance to derivative-based income strategies.

12:00 – 12:45 PM Breakout Sessions

- **From Vision to Value: Chorus Processes, Reimagined for the Agentic Era**

Track: AI & Automation

The market is shifting - and Chorus is shifting with it. This session gives business leaders and solution architects a full view of where Chorus stands today and where it is headed. We'll explore the forces reshaping intelligent process automation, how Chorus is evolving to meet both technology and business demands, and how the product is positioned to drive real client success. From a review of what we delivered in 2026 to a curtain-raiser on the themes defining 2027, you'll leave with a clear picture of the journey ahead. Because the foundations you build in Chorus today are the launchpad for an orchestrated, AI-enabled future.

- **Breaking New Ground | New SS&C Innovations in Servicing Alternatives**

Track: Alternative Investments: Hedge

SS&C prides itself on its innovative spirit, talented colleagues, and most importantly, its partnership with its clients. Enjoy this interactive session featuring several key initiatives and innovations for our Alternative clients.

- **The Continued Rise of Hybrids: Operational and Strategic Implications**

Track: Alternative Investments: Private Markets

Hybrids are now a strategic mainstay, and as adoption accelerates, so does the complexity—driven by a surge in entity count, intricate account structures, and sophisticated allocation rules. This session explores what it takes to manage that growth at scale, using real-world examples. From governance and reporting to liquidity management and operational oversight, we'll examine the challenges fund managers face today and the solutions gaining traction. Join a candid, forward-looking discussion designed for leaders navigating the operational and strategic demands of an increasingly hybrid-driven landscape.

- **The Data Bottleneck: Solving the Hidden Challenges of Market and Portfolio Data**

Track: Asset Management: Operations

For many investment firms, data has become a growing source of operational friction. Fragmented vendor and counterparty relationships, inconsistent data quality, rising costs, and heavy internal effort leave teams spending more time keeping systems aligned than extracting insights.

In this session, we'll explore the most common challenges firms face when managing valuations and reconciliation across multiple data sources - and how they're rethinking their data strategies with SS&C Data Services to reduce complexity, risk, and uncertainty. Drawing on real world examples, we'll examine how firms are simplifying custodial and market data acquisition, improving data consistency and governance, and streamlining downstream processes by consolidating and standardizing their data services. Attendees will leave with practical insight into how a more integrated, scalable data approach can lower costs, reduce operational strain, and better support growth as business demands change.

- **Expanding Access to Alternatives in 401(k)s and Target Date Strategies**

Track: Asset Management: Products & Strategy

Alternative investments are expanding into retirement vehicles, creating new opportunities for asset managers to reach a broader investor base. This session will examine how alternatives are being incorporated into defined contribution plans, collective investment trusts (CITs) and target date products to enhance portfolio diversification and access. Industry experts will discuss key considerations around product structure, liquidity, and operational scalability, as well as the impact of evolving regulatory expectations.

- **Asset Management 3.0: DeFi, Blockchain, and the On-Chain Revolution**

Track: Enterprise Technology

Is blockchain a revolution or an evolution? This session explores the practical applications of DeFi and on-chain asset management, examining how these technologies are reshaping the industry landscape and what SS&C is doing to stay ahead of the curve.

- **Inside the AI Factory: Building Intelligence for Healthcare-Specific Workflows**

Track: Health

Generic AI and large language models promise much but often fail in payer environments due to regulatory constraints, domain nuance, and audit requirements. This session goes inside the "AI factory" to explain why healthcare-specific intelligence demands embedded domain logic, governed models, and explainability. Attendees will gain insight into how AI can be applied responsibly to payer workflows without sacrificing trust or compliance.

- **The Insurer's Edge: Unlocking Value in Residential Whole Loans**

Track: Insurance & Lending

The next phase of insurance investing is being shaped by the need for capital efficiency, resilient income and differentiated sources of return. Residential Whole Loans are gaining momentum as a private credit allocation, offering attractive risk-adjusted returns, supportive regulatory capital treatment and meaningful diversification benefits. Join us for a discussion on the structural drivers behind this growth, key underwriting and portfolio construction considerations and how insurers are overcoming operational complexities as they scale exposure to this evolving asset class.

- **Transforming 401(k) Plans: Income is Now the Outcome**

Track: Retirement

Income as the outcome for 401(k)s represents a fundamental shift for the industry, moving from a focus on accumulation (building a large account balance) to decumulation (ensuring a steady, reliable income stream throughout retirement. Traditional pensions once provided guaranteed lifetime income, but 401(k) plans shifted investment and longevity risk entirely to the individual. Join our esteemed panelists as they explore; Participant income trends in the current retirement landscape; Modernizing 401(k) plans by offering products that provide pension-like payouts; Servicing and educating participants about the new retirement income asset class; Creating guided experiences leveraging AI to engage participants at key income decision points.

- **Building Continuity Through Succession Planning**

Track: Wealth Management

Succession planning is critical as wealth management firms and trust companies navigate leadership transitions and workforce changes. In this session, we'll discuss structured approaches to talent development, mentorship, and client continuity. You'll learn how these leaders support phased retirements, reinforce team-based service models, and create clear paths for future leaders. You'll also gain practical insights on aligning people, processes, and technology to sustain growth and long-term stability.

1:45 – 2:15 PM Breakout Sessions

- **Chorus Best Practices & Business Value: A Customer Panel**

Track: AI & Automation

Hear directly from Chorus customers on what's working, what they'd do differently, and how they're preparing for an agentic future. This panel brings together business leaders and solution architects who have moved beyond initial deployment to realize measurable ROI, reduce operational complexity, and innovate creatively. Our customers will share how they've approached process design, governance, and exception handling in practice, where they've avoided overengineering, and how they're thinking about AI agents working within workflows, alongside their digital workers and people. Expect candid stories, hard-won lessons, and a clear view of where Chorus value is landing today.

- **Benchmarking and Trends Across Hedge Fund Administration**

Track: Alternative Investments: Hedge

Explore the latest operational, technology, and service delivery trends shaping the hedge fund administration landscape. Industry leaders will share benchmarking insights across AI adoption, data transparency, operating model evolution, and client expectations.

- **Caught in the Middle: The Operational Gap Facing Today's Mid-Market Private Equity Firms**

Track: Alternative Investments: Private Markets

Middle-market private equity firms often reach an inflection point where continued growth demands a fundamental rethink of operating models, infrastructure, and staffing. In this panel, industry experts will share how firms are leveraging third-party fund administration and operational outsourcing to scale more effectively. The discussion will explore key trade-offs, highlight efficiency gains, and outline strategies to reduce operational strain while focusing on value creation. Attendees will walk away with practical insights on navigating the middle-market challenge and building a more agile, growth-ready operating model.

- **Future-Ready Investment Operations: How Today's Challenges are Shaping SS&C Advent's Roadmap**

Track: Asset Management: Operations

Investment management teams are under pressure to modernize operations while continuing to support existing platforms, workflows, and clients. As volumes grow, settlement cycles compress, and expectations for connectivity and automation increase, many firms are evaluating what capabilities they need next – and how to evolve without creating more disruption.

In this roadmap-focused session, we'll examine the key operational challenges shaping SS&C Advent's product strategy and share how those needs are influencing our investments across the Genesis platform as well as Eze OMS, APX, Sylvan, and Moxy. We'll take a closer look at recent enhancements – including cloud-native accounting and operations capabilities in Genesis, the Sylvan calculation service, and AI-enhanced workflows – and discuss how firms are using them to address today's demands while preparing for what's ahead. Attendees will gain a clearer view of where SS&C Advent is focused next, how current capabilities fit into that direction, and how to assess and prioritize technology decisions as investment operations continue to evolve.

- **One Model, Global Reach: EMEA & APAC Insights on Fund Distribution**

Track: Asset Management: Products & Strategy

As fund managers expand globally, the challenge isn't just entering new markets—it's doing so with consistency, efficiency, and local relevance. This session explores how a single distribution model can successfully scale across EMEA and APAC while adapting to varied regulatory environments, client expectations, and market dynamics. Drawing on real-world insights from both regions, speakers will highlight what truly needs to be standardized versus where flexibility is essential. Attendees will gain perspective on aligning global strategy with regional execution, navigating regulatory and operational complexity, and empowering local teams without fragmenting the overall model. The session offers practical takeaways for organizations seeking to extend global reach, enhance distributor relationships, and drive sustainable growth through a cohesive yet adaptable fund distribution approach.

- **Strategic Tech Leadership: M&A, Consolidation, and the 'Moat'**

Track: Enterprise Technology

For technology leaders, the choice between best-in-breed niche solutions and platform consolidation is critical. We discuss the strategic logic of SS&C's M&A approach, how to integrate acquired tech seamlessly, and how to identify and protect the technological 'moat' that provides competitive advantage.

- **Litigation-Proof Operations: What Claims Systems Must Do to Protect the Plan**

Track: Health

In healthcare litigation, outcomes are often determined less by intent and more by documentation, traceability, and system behavior. This session explores how claims operations, technology, and compliance intersect when disputes arise. Learn which system capabilities matter most when defending decisions, producing evidence, and demonstrating procedural integrity—and how operational readiness plays a critical role long before legal action begins.

- **The Insurance Investment Platform Decision: When, Why, and How Firms Re-Evaluate**

Track: Insurance & Lending

This session explores the factors that lead insurers to re-evaluate their investment operations platforms, the risks of waiting too long, and how leadership teams approach these decisions while managing business continuity. The discussion will focus on common triggers and practical considerations in evaluating new approaches.

- **Rethinking Retirement: Innovation, Alternatives, and AI in Modern Retirement Plans**

Track: Retirement

The retirement landscape is evolving faster than ever, reshaped by new asset classes, shifting client expectations, and emerging technologies. In this dynamic panel, industry experts discuss how financial advisors are adapting their strategies to meet the demands of today's investors and tomorrow's retirees. From increased allocation to alternative investments and private markets to the growing relevance of digital assets, panelists will explore what's moving from "emerging trend" to "mainstream consideration." Attendees will gain practical insights into what's working in real-world, where advisors are encountering challenges, and what support or capabilities are still needed to effectively navigate this next phase of retirement planning. Key Takeaways include: How advisors are incorporating alternatives, private markets, and digital assets into retirement strategies; Practical applications of AI across client service, portfolio construction, and practice management; Common hurdles in implementation—and how leading advisors are overcoming them; Where the industry is headed and how to stay ahead of the curve.

- **Inside Investment Management Services | Models, UMAs, and Tax Efficiency**

Track: Wealth Management

This session examines how Black Diamond Investment Management Services supports sophisticated wealth management at scale. We will highlight key capabilities in model delivery, unified managed accounts, and tax-aware strategies, and you'll learn how firms use IMS to enhance portfolio construction, streamline tax-aware trading, and deliver personalized outcomes. The discussion will also address how firms align investment operations with evolving business models to support growth, integration, and a consistent client experience.

2:30 – 3:00 PM Breakout Sessions

- **Chorus - Art of the Possible: The Full Portfolio, Live and in Action**

Track: AI & Automation

Designed for IT professionals, implementation consultants, and technical stakeholders, this session is a live demonstration of Chorus as the binding layer of your enterprise. Watch how UX Builder powers seamless interfaces for internal and external users, while webhooks, API integrations, IDP connectivity, and Email AI keep external systems connected and responsive. See data objects driving intelligent orchestration, with search and analytics unlocking new operational insight. Explore AI and agent workflows embedded directly in process — powered by AI Gateway integration, WorkHQ agent orchestration, and external agent connectivity. We'll also cover migration best practices and platform enablement, so you can amplify Chorus as a unified system of integration, orchestration, and experience. No slides. No theory. Just Chorus doing what it does — end-to-end orchestration at scale.

- **Establishing a Single Source of Truth for Hedge Fund Tax Automation**

Track: Alternative Investments: Hedge

In this session, we will explore how technology and direct access to the golden source of data, the books and records, can streamline and create real-time tax analytics and compliance.

- **Stronger Controls, Faster Growth: Rethinking Operational Risk in Private Markets**

Track: Alternative Investments: Private Markets

Operational Risk has emerged as one of the most significant performance threats in private markets. It influences valuations, delayed fundraising, and ultimately undermines LP confidence. As fund structures grow more complex and regulatory expectations intensify, CFOs and senior fund leaders are increasingly on the frontline, tasked with building sustaining operational resilience. In this session we will explore the practices that distinguish high-performing operations: real-time visibility across portfolios, standardized and defensible workflows, and the ability to proactively identify and mitigate risks before they escalate. Walk away with actionable strategies to strengthen controls, reduce uncertainty, and build an operating model that scales with your fund's future growth.

- **Evolving Products, New Markets, New Risks: Keeping Compliance in Lockstep with Growth**

Track: Asset Management: Operations

Mutual fund complexes are operating in an environment defined by margin pressure, evolving product structures, and expanding market reach. Organizations are modernizing in different ways, launching new vehicles such as ETFs (including ETF share classes), exploring tokenization, and entering new geographic markets including offshore structures, all while continuing to support traditional products that remain core to their business. These shifts are not about replacing the mutual fund model, but about ensuring it remains relevant, competitive, and aligned with changing investor expectations. As strategies evolve, so do the compliance implications. Different products, distribution channels, and jurisdictions introduce new layers of complexity, requiring compliance frameworks that can adapt without slowing the business down. This session focuses on that intersection – i.e., how strategic decisions translate into real-world compliance considerations, and what it takes for service providers to remain aligned. We will discuss how transfer agents can operate in step with these evolving strategies by adapting controls, second-line oversight, and processes to support new products, expanded markets, and increasing expectations around scale, speed, and technology. The goal is a frank conversation about what it actually takes for a transfer agent's compliance infrastructure to keep pace — without becoming the thing that slows the business down.

Tokenization and Digital TA: From Experiment to Infrastructure - Why Funds and Firms Can't Ignore What is Next

Track: Asset Management: Products & Strategy

Tokenization is quickly moving beyond proof-of-concepts and headlines into real production use cases across the investment lifecycle. From tokenized funds and digital transfer agency to intraday settlement and programmable ownership, the implications for how assets are issued, distributed, serviced, and reported are profound. This session cuts through the hype to explain what tokenization actually means for asset managers, fund administrators, and service providers today—and why ignoring it creates long-term strategic risk. SS&C experts will explore how tokenization complements (not replaces) traditional fund structures, where regulatory clarity is emerging and how firms should think about readiness across operations, technology, governance, and client experience. Speakers will also talk to digital TA and how to implement a unified investor and investment servicing model that supports all asset and product types. We'll introduce SS&C's new approach that combines market-leading transfer agency, investor and investment servicing and digital investment capabilities to help firms embrace new investment structures, continuously extend servicing capabilities and evolve without major transformation programs.

- **The Maturity Journey: Scaling Tech Leadership Across the Enterprise**

Track: Enterprise Technology

Scaling technology excellence requires a balance between central strategy and regional execution. From the point of view of business unit CTOs, this session shares stories from the maturity journey of different business units and how to foster an enterprise culture that drives innovation.

- **The Invisible Work of Adjudication: Turning Operational Data into Executive Insight**

Track: Health

Prescription benefit operations are frequently overlooked despite being a primary driver of cost and risk for plans. This session explores the 'invisible work' of claims adjudication and demonstrates how to transform operational data into executive intelligence. Learn how analytics and KPIs turn a necessary operational function into a powerful strategic lever.

- **How Investment Strategy Shifts Are Stress-Testing Insurance Operations**

Track: Insurance & Lending

This session examines how changes in investment strategy and asset allocation can create downstream operational and reporting challenges. It highlights how these impacts often emerge after strategic decisions are made, and why they are frequently underestimated at the outset.

- **Leading the Human Side of Operational Change for the AI Frontier**

Track: Retirement

As AI transforms the future of work, change management is as much about people as it is about technology. Operations leaders are the bridge between strategy and execution, turning change initiatives into daily behaviors that actually stick. They succeed by anticipating human reactions, addressing fear, building clarity, and creating trust at the front line where change is felt most. Building a “Human centered AI approach” can create sustainable scale—where the AI handles the volume and the humans handle the value.

- **In Focus | Key Black Diamond Capabilities**

Track: Wealth Management

Join us as we explore select Black Diamond capabilities that enhance the advisor and client experience. This session provides a detailed look at key areas highlighted during the roadmap session, showing how these tools support daily workflows, improve visibility, and increase engagement. Our product experts will demonstrate current uses and highlight ongoing developments to meet your business needs.

3:15 – 3:45 PM Breakout Sessions

- **Chorus Roundtable: Practitioner Conversations**

Track: AI & Automation

Four parallel small-group discussions running side by side, each led by an SS&C Blue Prism Chorus expert. Pick the table that matches what you're working through right now. These are working conversations, not presentations — practitioners comparing notes, sharing what's actually playing out in their operations, and asking the questions you don't get to ask in a keynote. Honest dialogue, real problems, and takeaways you can put to work on Monday.

Topic 1: Beyond the Screen — Designing Experiences That Actually Engage: UX Builder helps in rapid HiTL and App creation experiences tailored for Process integration.

Topic 2: Trust, Control & Data — Governing and Embracing AI and Agent Influx into Processes and Operations

Topic 3: Co-Workers or Co-Pilots — Rethinking Enterprise Process Design for the Agentic Era: Agents are no longer tools — they are participants.

Topic 4: Migrate, Modernize, Maximize — Making the Most of Your Chorus Investment

- **The Geneva Exchange | Peer-to-Peer Roundtables**

Track: Alternative Investments: Hedge

Some of the most valuable takeaways from SS&C Deliver come from your fellow industry peers! Engage and network during the roundtable discussions and discuss best practices and share solutions to common challenges.

- **The LP Playbook Is Changing: How GPs Win Allocations in 2026 and Beyond**

Track: Alternative Investments: Private Markets

The fundraising landscape has shifted, and LPs are making allocation decisions with greater scrutiny than ever. In this session, we'll unpack where LPs are actively deploying capital today, which strategies and geographies are capturing attention, and how the broader fundraising market is expected to evolve heading into 2027. We'll examine what separates the GPs getting funded from those stuck in due diligence limbo. We'll also explore how technology is reshaping the fundraising process and what tools leading GPs are using to accelerate closes and deepen LP relationships. Whether you're mid-raise or planning your next fund, walk away with a clear picture of where the market is heading and how to position your firm to win.

- **Hybrid Operating Models: Investment Operations in a Higher-Velocity Market**

Track: Asset Management: Operations

Operations teams are navigating increasing complexity: higher transaction volumes, tighter controls, and persistent reconciliation backlogs. At the same time, they're under growing pressure to support faster settlement cycles. Behind the scenes, manual and time-intensive processes drive critical functions like reconciliation, exception management, and data validation.

In this Advent Managed Services session, we'll examine how firms are responding to these challenges by rethinking their operating models. We'll discuss where operational bottlenecks most commonly arise, how responsibilities are being redistributed across internal teams and external partners, and what role automation and AI are beginning to play in reconciliation, break management and exception handling. We'll review hybrid operating models that combine technology, services, and AI to support day-to-day operations at scale and focus on key considerations, trade-offs, and lessons learned as firms adapt operations to meet evolving market demands.

- **SMA and UMA Personalization at Scale: Growth Without the Growing Pains**

Asset Management: Products & Strategy

SMA and UMA programs offer powerful opportunities for personalization and growth, but many firms are reaching operational limits as complexity increases. Disconnected systems, fragmented data, and asynchronous workflows are driving cash drag, reconciliation delays, compliance risk, and inconsistent client outcomes.

In this session, we'll examine where common SMA and UMA operating models begin to break down and why traditional approaches struggle to scale across growing account volumes, strategies, and mandates. We'll discuss how firms are modernizing their operations by better aligning portfolio management, trading, compliance, and reporting across increasingly complex account structures with Genesis. Using real-world scenarios, we'll illustrate what a more connected, scalable operating model looks like in practice, and how emerging technologies – including AI-driven intelligence – can help simplify day-to-day operations, reduce friction, and support better decision-making. Whether you're scaling existing SMA or UMA programs, or addressing operational bottlenecks, this session offers a realistic path to scaling personalization without growing complexity.

- **The Feedback Loop: Customer-Driven Innovation and Pain Point Resolution**

Track: Enterprise Technology

Innovation doesn't happen in a vacuum. This session focuses on the mechanisms we use to 'Ask the Customer,' elevate pain points into the product roadmap, and use individual client engagements (CABS) to inform broader technology strategy.

- **Build Your AI Value Realization Plan: A Hands-On Workshop**

Track: Health

This interactive workshop moves from strategy to execution. Participants will identify near term savings, prioritize AI use cases, and target operational improvements aligned to business objectives. Takeaways include practical insights for immediate action. After the conference, we will partner with each participant to develop and execute a customized 12-month value realization plan aligned to their priorities.

- **Managing Investment Complexity Without Increasing Operational Risk**

Track: Insurance & Lending

This session focuses on how insurers are managing increasing investment complexity while maintaining control, transparency, and auditability. It will explore how firms are adapting governance, processes, and oversight to support more complex portfolios without introducing additional operational risk.

- **Retirement Fraud in the Real World: Where Plans, Participants, and Processes Are Vulnerable**

Track: Retirement

Retirement fraud is evolving rapidly, driven by social engineering, account takeover tactics, payment fraud, and increasingly sophisticated attempts to exploit operational gaps across participant servicing channels. As retirement platforms continue to modernize and participant expectations continue to rise, firms are being challenged to strengthen fraud prevention while maintaining a seamless participant experience. This session will explore how fraud is impacting the retirement landscape in practice, including where firms are seeing heightened exposure, how attacks are moving across channels and touchpoints, and what operational and oversight challenges organizations are navigating in response. The discussion will focus on practical realities rather than theory, including authentication, transaction controls, servicing workflows, escalation processes, and participant communication. Attendees should expect a direct and business-focused discussion on how firms are approaching fraud risk in the retirement space today, where organizations remain vulnerable, and how the industry is adapting to a changing threat environment.

- **M&A in Practice | From Acquisition to Integration**

Track: Wealth Management

Learn how firms approach mergers and acquisitions with a focus on long-term success. In this interview-style session, industry experts discuss post-acquisition integration, including aligning teams, systems, and client experiences. You'll gain practical insights on overcoming challenges, maintaining momentum after a deal closes, and positioning the combined firm for continued growth

4:15 – 5:00 PM Closing General Session

- **Applied AI: Build, Operate and Thrive with SS&C**

Track: General Sessions

Every firm is facing the same challenge: how to capture the value of AI while staying sovereign over the data, systems and people assets that make you who you are. Our answer is simple: don't feed the models your competitive edge - use them to sharpen and compound it, with SS&C. For decades, SS&C's technologies and services have enabled organizations to scale, evolve and even move into new business lines. Now, our thoughtful, governed approach to applied AI within highly regulated and mission critical operations is helping realize the value inside those interconnected assets - in the application layer - where your real advantage lives. In this closing session, Rob Stone and Anthony Caiafa show what that looks like in practice: real deployments from SS&C's own Customer Zero program, SS&C WorkHQ orchestrating work across the operational worlds in the room, a live look at what's next in the stack, and the governance approach no other provider can match. And you'll leave with SS&C's agentic blueprint in your inbox, to help you build, operate and thrive.