

Future Proof Citywide will feature two Breakthru Programs, making it easy for you to meet new people, discover new companies, make new memories and create incredible opportunities that deliver real results.

**Breakthru Meetings Program:** Future Proof's game-changing meetings program will help facilitate 25,000+ meetings between LPs, wealth managers, UHNW investors, asset owners and technologists. It's the best way to meet everyone you want to meet at Future Proof Citywide!

- Join up to 24 Breakthru meetings, limited only by your availability and mutual interest. All meetings are double opt-in, ensuring mutual interest and meaningful conversations.
- Meet the people you want to meet, across dozens of use cases. Whether you need to meet potential partners, discover the latest startups, find innovative solutions for your company, or even explore new career opportunities, we've got it all.

### **Breakthru Hosted Experiences:**

- Breakthru Networking Dinners: 15-25 person networking dinners.
- Breakthru Activities: From yoga lessons to cooking classes, taking place on the boardwalk.
- Industry Content: Expert-level content meticulously curated for your team's growth.
- Level Up Content: Shared learning experiences that foster growth in all aspects of life and work.

### 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, text, and more. If you don't get an email, check spam (from donotreply.fpcitywide25@eventpt.com) and reach out to us at breakthru@futureproofhq.com with any questions.

TASK	TIME TASK OPENS		PENS	TASK DEADLINE	
COMPLETE YOUR PROFILE REGISTRATION DEADLINE	10 MINUTES	MONDAY, FEBRUARY 10	9:00 AM ET	FRIDAY, FEBRUARY 21	6:00 PM ET
SELECT BREAKTHRU EXPERIENCES	5 MINUTES	MONDAY, FEBRUARY 10	9:00 AM ET	FRIDAY, FEBRUARY 28	6:00 PM ET
REQUEST MEETINGS	60-90 MINUTES	MONDAY, FEBRUARY 24	9:00 AM ET	FRIDAY, FEBRUARY 28	6:00 PM ET
OPT IN TO REQUESTS YOU'VE RECEIVED	<30 MINUTES	MONDAY, MARCH 3	9:00 AM ET	FRIDAY, MARCH 7	6:00 PM ET

TASK	TIME	TASK	OPENS	TASKI	DEADLINE
ACCEPT MEETINGS	<10 MINUTES	MONDAY, MARCH 10	9:00 AM ET	WEDNESDAY, MARCH 12	6:00 PM ET
ACCEPT ANY ADDITIONAL MEETINGS	<10 MINUTES	THURSDAY, MARCH 13	9:00 AM ET	THURSDAY, MARCH 13	6:00 PM ET
ACCEPT BREAKTHRU MEETINGS AND EXPERIENCES CALENDAR INVITES	<10 MINUTES	FRIDAY, MARCH 14	9:00 AM ET	FRIDAY, MARCH 14	6:00 PM ET
FUTURE PROOF CITYWIDE ATTEND YOUR BREAKTHRU MEETINGS AND EXPERIENCES		SUNDAY, MARCH 16	SEE NEXT PAGE FOR MEETING TIME SLOTS	WEDNESDAY, MARCH 19	SEE NEXT PAGE FOR MEETING TIME SLOTS
PROVIDE FEEDBACK	10 MINUTES	FRIDAY, MARCH 21	9:00 AM ET	TUESDAY, APRIL 1	6:00 PM ET
CLAIM TRAVEL & HOTEL REIMBURSEMENT HOSTED ATTENDEES ONLY	10 MINUTES	WEDNESDAY, APRIL 2	9:00 AM ET	FRIDAY, MAY 9	6:00 PM ET

### **TIMING OF BREAKTHRU MEETINGS**

All Breakthru Programs will take place on Monday, March 17 and Tuesday, March 18. Below is a general schedule. We understand you may have other things going on, which is why you can opt out of any time slots you're not available for. You will not miss any content sessions for meetings.

START (PT)	END (PT)	MINUTES	MONDAY, MARCH 17
9:20 AM	9:35 AM	15	Meeting Slot #1
9:35 AM	9:38 AM	3	Transition time
9:38 AM	9:53 AM	15	Meeting Slot #2
9:53 AM	9:56 AM	3	Transition time
9:56 AM	10:11 AM	15	Meeting Slot #3
10:11 AM	10:14 AM	3	Transition time
10:14 AM	10:29 AM	15	Meeting Slot #4

### TIMING OF BREAKTHRU MEETINGS CONTINUED

All Breakthru Programs will take place on Monday, March 17 and Tuesday, March 18. Below is a general schedule. We understand you may have other things going on, which is why you can opt out of any time slots you're not available for. You will not miss any content sessions for meetings.

START (ET)	END (ET)	MINUTES	MONDAY, MARCH 17
12:10 PM	12:25 PM	15	Meeting Slot #5
12:25 PM	12:28 PM	3	Transition time
12:28 PM	12:43 PM	15	Meeting Slot #6
12:43 PM	12:46 PM	3	Transition time
12:46 PM	1:01 PM	15	Meeting Slot #7
1:01 PM	1:04 PM	3	Transition time
1:04 PM	1:19 PM	15	Meeting Slot #8
4:15 PM	4:30 PM	0:15	Meeting Slot #9
4:30 PM	4:33 PM	0:03	Transition time
4:33 PM	4:48 PM	0:15	Meeting Slot #10
4:48 PM	4:51 PM	0:03	Transition time
4:51 PM	5:06 PM	0:15	Meeting Slot #11
5:06 PM	5:09 PM	0:03	Transition time
5:09 PM	5:24 PM	0:15	Meeting Slot #12

### TIMING OF BREAKTHRU MEETINGS CONTINUED (2X)

All Breakthru Programs will take place on Monday, March 17 and Tuesday, March 18. Below is a general schedule. We understand you may have other things going on, which is why you can opt out of any time slots you're not available for. You will not miss any content sessions for meetings.

START (ET)	END (ET)	MINUTES	TUESDAY, MARCH 18
9:20 AM	9:35 AM	15	Meeting Slot #13
9:35 AM	9:38 AM	3	Transition time
9:38 AM	9:53 AM	15	Meeting Slot #14
9:53 AM	9:56 AM	3	Transition time
9:56 AM	10:11 AM	15	Meeting Slot #15
10:11 AM	10:14 AM	3	Transition time
10:14 AM	10:29 AM	15	Meeting Slot #16
12:10 PM	12:25 PM	15	Meeting Slot #17
12:25 PM	12:28 PM	3	Transition time
12:28 PM	12:43 PM	15	Meeting Slot #18
12:43 PM	12:46 PM	3	Transition time
12:46 PM	1:01 PM	15	Meeting Slot #19
1:01 PM	1:04 PM	3	Transition time
1:04 PM	1:19 PM	15	Meeting Slot #20
4:15 PM	4:30 PM	0:15	Meeting Slot #21
4:30 PM	4:33 PM	0:03	Transition time
4:33 PM	4:48 PM	0:15	Meeting Slot #22
4:48 PM	4:51 PM	0:03	Transition time
4:51 PM	5:06 PM	0:15	Meeting Slot #23
5:06 PM	5:09 PM	0:03	Transition time
5:09 PM	5:24 PM	0:15	Meeting Slot #24

## **Until February 10**

If your Organization has purchased Breakthru Hosted Meetings: Assign Meetings Reps (5 minutes)

Org Admin can do this on: Desktop

If you're an Organization Admin you (or another Org Admin) must assign individuals from your organization as Meetings Representatives (to take Breakthru Hosted Meetings your organization has purchased) by Monday, February 10 at 9:00 AM ET.

- Individuals must be registered to attend Future Proof Citywide to be assigned as a Meetings Rep.
- We recommend having 1 Meetings Rep per 10 Breakthru Hosted Meetings. If your organization has purchased 30 Breakthru Hosted Meetings, you should assign 3 or more Meetings Reps. There's no limit for how many Meetings Reps your organization can have.
- Meetings Reps will be able to complete their profile from Monday, February 10 Friday, February 21.

## February 10 - February 21

Complete Your Breakthru Meetings Profile and Select Breakthru Experiences (10-15 minutes)

You can do this on: Desktop and Future Proof Citywide Mobile App

Start Your Breakthru Meetings Profile on **Monday, February 10**, and complete it by **Friday, February 21 at 6:00 PM ET.** We'll share everyone's profiles at the same time once they're all complete.

- **Tell us about yourself.** Select from 100+ data points to help others determine if they want to meet with you.
- **Give us your availability or default to fully available.** We'll send you invites to block your calendar. Being available for more time slots increases the chances of being able to schedule meetings for you.
  - You can change your availability at any time from Monday, February 10 to Friday, March 7 at 6:00 PM ET.
- Post on Social to tell your X followers and LinkedIn contacts that you're going to Future Proof Citywide!
- **Make an Announcement:** Tell the thousands of Future Proof Citywide participants (including 100+ Media & Sell Side Analysts) about your newly announced products, partnerships, funding, acquisitions, research and anything else!



## February 10 - February 21 (continued)

Complete Your Breakthru Meetings Profile and Select Breakthru Experiences (10-15 minutes)

You can do this on: Desktop and Future Proof Citywide Mobile App

- 1. If you're a Hosted Financial Advisor, Limited Partner or UHNW Investor:
  - You are required to be available for at least 16 of the 24 time slots
  - Confirm if you want Non-Hosted Meetings. In your application, you checked if you want to do Non-Hosted Meetings in addition to your requirement of up to eight (8) 15-minute onsite meetings with participating sponsors ("Hosted Meetings"). We'll ask you to confirm your choice when completing your profile. We recommend doing both Hosted and Non-Hosted Meetings to get the most out of Future Proof Citywide!

### If you're an Organization Admin:

- Edit and complete profiles on behalf of participants from your organization (they can thank you later!).
- Check out the Org Admin Pro Tips at the end of these guidelines for more info.
- 2. **Registration Deadline!** To participate in Breakthru Meetings, you must register before **Friday, February 21 at 6:00 PM ET.**
- 3. Select Your Breakthru Experiences

Breakthru Experiences are transformative events, activities and content that take place with pre-selected groups of attendees on the boardwalk, ranging from [dance lessons] to [cooking classes].

**Breakthru Experiences:** Starting **Monday, February 10** you must select all Breakthru Experiences you want to attend, and complete your selections by **Friday, February 28**.

- You can view details of all Experiences including location, description, sponsor (if applicable), and time slots.
  - Selecting an Experience does not guarantee you will be scheduled for it, due to capacity limits and other factors. We recommend you select all Experiences you would attend.
  - We will send you invites to block your calendar for all the Experiences you select.
     These are holds and will be removed once Experiences are finalized.
  - If you're scheduled for an Activity, you will receive a final calendar invite on Friday,
     March 14.



## February 24 - February 28

Request Meetings (30-90 minutes)

You can do this on: Desktop and Future Proof Citywide Mobile App

### 1. Request Meetings:

- Start requesting meetings on Monday, February 24 and complete by Friday, February 28 at 6:00 PM ET.
  - Select everyone you want to meet! We recommend you make a minimum amount of meeting requests equal to 4x the number of time slots you're available for.
    - Select everyone from an organization you want to meet. You can have meetings with >1 person from the same organization, but only once we've scheduled all possible meetings with unique organizations.
  - Use Filters and Predefined Lists to quickly and efficiently make selections.
  - Don't wait til the last minute to make selections! With tools like Bookmarks, you can start your selections and come back if needed to finish them.
  - Indicate your interest level. 'Very Interested' selections get scheduled first, before 'Interested' ones.

### • If you're a Meetings Rep:

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



### March 3 - March 7

Opt In to Requests (30 minutes)

You can do this on: Desktop and Future Proof Citywide Mobile App

- Opt in to requests you received from people you didn't previously select starting Monday, March 3 and complete by Friday, March 7 at 6:00 PM ET.
  - Everyone:
    - We facilitate meetings based only on the requests you opt-in to (and your previous selections), so please opt in to every request from someone you'd spend 15 minutes with.
    - The more requests you opt in to, the more meetings you'll likely get.
  - o If you're a Hosted Financial Advisor, Limited Partner or UHNW Investor:
    - You must opt in to Hosted Meeting requests from at least 24 organizations.
      - Your Hosted Meeting requests will be displayed at the top of the screen when you log in.
      - You can opt in to multiple requests from the same organization, but they'll only count as I organization.
      - If you receive Hosted Meeting requests from < 24 organizations, then you must opt in to the number you receive. But remember, we'll schedule only 8 Hosted Meetings max.
    - Non-Hosted Meeting requests: If you're doing Hosted and Non-Hosted Meetings and you've received Non-Hosted Meeting requests, you should also opt in to these. We facilitate meetings based *only* on the requests you opt in to (and your previous meeting requests), so please opt in to *every request from someone you'd spend 15 minutes with*.
  - o **If you're a Meetings Rep:** Opt-ins to requests from Hosted Financial Advisors, Limited Partners & UHNW Investors will default to Hosted Meeting requests.
  - Org Admins: You can opt in on behalf of participants from your organization.
- 2. Availability Deadline! You can change your availability until Friday, March 7 at 6:00 PM ET.

### March 10 - March 12

Accept Your Meetings (<10 minutes)

You can do this on: Desktop and Future Proof Citywide Mobile App

- On Monday, March 10, you'll receive an email to review and accept each of your meetings.
   Please do this by Wednesday, March 12 at 6:00 PM ET.
  - Everyone:
    - You get meetings with people you selected who also selected you. Not accepting meetings might disappoint others!
    - If you don't accept a meeting by the deadline, that meeting won't get scheduled.
    - You need to accept your own meetings Org Admins cannot accept on your behalf.
  - o If you're a Hosted Financial Advisor, Limited Partner or UHNW Investor:
    - You must accept all of your Hosted Meetings (max of 8). You won't be penalized if the other person doesn't accept.
    - You should also accept your Non-Hosted Meetings (if any).
  - If you're a Meetings Rep:
    - You must accept all of your Hosted Meetings. Hosted Meetings that aren't accepted will not be refunded to your organization.
    - You should also accept your Non-Hosted Meetings (if any).

### March 13

**Accept Additional Meetings** (<10 minutes)

You can do this on: Desktop and Future Proof Citywide Mobile App

**Accept Any Additional Meetings:** If you received any additional meetings, on **Thursday, March 13**, you'll receive an email to accept them. Please accept these meetings by **THE SAME DAY at 6:00 PM ET.** 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.



### March 14

Accept Calendar Invites (<10 minutes)

- Accept Your Meetings Calendar Invites: On Friday, March 14, you'll receive a calendar
  invite for each scheduled meeting. YOU MUST ACCEPT all calendar invites by THE SAME DAY
  at 6:00 PM ET. This is a quick turnaround, but--it won't take more than 5 minutes.
  - a. **Important Note:** Neither we nor the person you're meeting will be notified if you decline a calendar invite! Email us at breakthru@futureproofhq.com if you can't make it to a meeting. It's not enough to simply decline a calendar invite.
  - b. **We can't change** *any* **meeting times** (fun fact: Future Proof Citywide is facilitating 25,000+ meetings!), and you should not reschedule scheduled Breakthru meetings outside of the program.
  - c. 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!
- 2. Accept Your Breakthru Experiences Program Calendar Invites: On Friday, March 14, you'll receive a calendar invite for each Activity you have been scheduled for. You must accept all calendar invites by THE SAME DAY at 6:00 PM ET.
  - Important note: We won't know if you reject a calendar invite! If you can't make the Activity you should cancel your attendance using the Future Proof Citywide platform (desktop or mobile app). This will help the Activity organizer plan for and manage their Activity.

### March 17 - March 18

### Attend Your Breakthru Meetings and Breakthru Experiences

Attend Your Breakthru Meetings: It's time! You must join all your scheduled meetings. Not showing up may result in you and your organization being barred from future participation. Here's what you need to know:

- Where are the meetings? All meetings are held in a dedicated Breakthru Meetings area (the size of a football field!) and each meeting is assigned a table number.
- **How do I know where to go?** Check the Future Proof Citywide mobile app (or your calendar invites) for the assigned table number for each meeting, and at the start of each scheduled meeting proceed directly to the assigned table for your meeting (table numbers are in the app and your calendar invites).
- When should I arrive? You should arrive at the Breakthru Meetings area 5-10 minutes before your first scheduled meeting. There is no check-in required. If you have any questions, there will be a Q&A desk.



## March 17 - March 18 (continued)

### Attend Your Breakthru Meetings and Breakthru Experiences

- What happens if the person I'm meeting doesn't show up? Give them 5 minutes and if they've still not joined, click the "Mark as No Show" button in the Future Proof Citywide mobile app.
- What else?
  - **Do** join each meeting on time and **don't** exceed the allotted 15 minutes for each scheduled meeting.
  - Do check the table number for each scheduled meeting--each of your meetings will be at a different table. There is a 3-minute transition time between each meeting.
  - o **Do** download the Future Proof Citywide mobile app ahead of your meetings (if you haven't already). You can take notes and request follow-ups in the app.

### **Attend your Scheduled Breakthru Experiences:**

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

## March 21 - April 1 Submit Feedback Survey

You can do this on: Desktop and Future Proof Citywide Mobile App

Your feedback is important to us! On **Friday, March 21**, you will receive an email to provide feedback on Future Proof Citywide and Breakthru Programs to help us improve. Please share your thoughts by **Tuesday, April 1 at 6:00 PM**.

• Once you provide feedback, you can download a summary of your meetings, including your notes and contact details of who you met.



## April 2 - May 9

Hosted Attendees: Submit Expenses and Claim Your Reimbursement

**Show me the money!** If you're a Hosted Financial Advisor, Limited Partner or UHNW Investor, after you complete feedback, you can provide details for reimbursement starting **Wednesday**, **April 2**. You must submit your expenses by **Friday**, **May 9 at 6:00 PM ET**.

• Submit your expenses via the Future Proof platform to claim up to \$750 of travel and hotel reimbursement. We provide reimbursements on a rolling basis.

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 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 Meetings Program indicate any interest in meeting with you outside of the Breakthru 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 organization, you'll need to use your desktop (the Future Proof Citywide mobile app does not support Org Admin activities). If you're a participant just completing action items for yourself, you can use the Future Proof Citywide mobile app.
- 'Manage Participants & Roles' screen: From this screen you can:
  - Select who you want to manage: Go to 'Manage Participants & Roles' and select the participants from your organization that you want to 'Manage As Org Admin'. You can help complete action items for them.
  - Add or Assign Org Admins: Need some Org Admin backup? Click 'Add New Org Admin' to add unregistered individuals as Org Admins, or click 'Assign' to assign participants as Org Admins.

### • Managing different types of Participants:

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

#### • Request Meetings stage:

- **'Manage Organization's Participants' Selections' screen:** If you want to help make selections for some or all of the participants you're managing, check the boxes next to their names.
- o **Org Admin view:** Org Admins can request meetings for multiple participants from a single screen. Your productivity just went up ...!!!
  - To request to meet an individual for one or more of the participants you're requesting meetings for, indicate each participant's interest level ('Interested' or 'Very Interested'). You can also add a reason for each request.
  - If you view a System Generated List, you can see if it applies to all, or only some, of the participants you're requesting meetings for.
  - You can see if an individual has been selected by other participants from your organization (if they've shared their meeting requests with one or more of the participants you're requesting meetings for).



## Organization Admins: Pro Tips (continued)

**Collaboration & Efficiency tools:** Just like regular participants, Org Admins can use the full range of collaboration and time-saving features:

- Bookmarks: If you're not sure you want to request to meet someone (for the participants you're requesting meetings for, or yourself if you're a participant), simply Bookmark them and decide later (they'll be under 'Bookmarks').
- Saved Lists: Click 'Save List' to nAMe and save a specific search/filter result so you can come back to it later (it'll be under 'My Lists').
- Meetings Rep-specific functionality:
  - Share Saved Lists: If you're a Meetings Rep and an Org Admin, you can share your saved lists with all Meetings Reps from your organization by toggling the slider when you are saving or editing the list. They'll automatically get any changes you make.
  - **Lists Shared With Me:** If you're a Meetings Rep and an Org Admin, if Meetings Reps from your organization have shared their lists, they'll be under 'Lists Shared With Me'.
  - Share Participants' Requests: You can share the meeting requests of the Meetings Reps you're requesting meetings for from the 'Manage Participants' meeting requests screen. If you're a Meetings Rep, you can share your own meeting requests from there as well. Note that meeting requests can only be shared with other Meetings Reps.
- Meeting Requests Progress: Click the tooltip at the top of the screen to track the progress
  of participants you're helping manage against their recommended minimum number of
  meeting requests.

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

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