



AGENDA

Times listed are in Mountain Time.

Monday, September 22

Arrivals and Welcome

Check in / Registration

Event Foyer Area, Lobby Level

12:00 PM – 6:00 PM

Pick up your official badge and confirm the events you've registered for.

Welcome Reception and Dinner

Jordanelle Foyer, Lake Level

6:00 PM – 8:30 PM

Tuesday, September 23

Breakfast

Deer Creek Ballroom, Lake Level

6:15 AM – 7:45 AM

Welcome and Opening Remarks

Jordanelle Ballroom, Lake Level

8:00 AM – 8:30 AM

Led by Dave Blair

Product Update with Live Demo

Jordanelle Ballroom, Lake Level

8:30 AM – 9:15 AM

Led by Ridgeline's product experts

Tuesday, September 23 - continued

Customer Spotlight

Jordanella Ballroom, Lake Level

9:15 AM – 9:45 AM

Led by Bridget Barrot

Break

9:45 AM – 10:00 AM

AI Breakout: Innovation at Elevation Workshop: Agents Edition

Strawberry Room, Lake Level

10:00 AM – 11:00 AM

Team up with Ridgeline experts and fellow guests for a hands-on product build

AI Breakout: How to Upskill Your Entire Firm with AI

Jordanella Ballroom, Lake Level

10:00 AM – 11:00 PM

Lunch

Deer Creek Ballroom, Lake Level

11:15 PM – 12:45 PM

Product Kiosks

Jordanella Foyer, Lake Level

12:45 AM – 2:20 PM

Hands-on Office Hours with Ridgeline Product Experts

Front Office Breakout: New ETF and Mutual Fund Strategies

Jordanella Ballroom, Lake Level

12:45 PM – 1:25 PM

Led by Ridgeline's product experts

Back Office Breakout: Tips for Implementation Success

Strawberry Room, Lake Level

12:45 PM – 1:25 PM

Led by Ridgeline's product experts

Tuesday, September 23 - continued

Break

1:25 PM – 1:40 PM

Front Office Breakout: What's Changed in TOM (since Base Camp 2024)

Jordanelle Ballroom, Lake Level

1:40 PM – 2:20 PM

Led by Ridgeline's product experts

Back Office Breakout: The Power of Ridgeline Reporting

Strawberry Room, Lake Level

1:40 PM – 2:20 PM

Led by Ridgeline's product experts

Break

2:20 PM – 2:35 PM

Fireside Chat with Patrick O'Shaughnessy and Chris Young

Jordanelle Ballroom, Lake Level

2:35 PM – 3:20 PM

Featuring Patrick O'Shaughnessy, host of the *Invest Like the Best* podcast and Chris Young a key champion and architect of the Microsoft–OpenAI deal.

Break

3:20 PM – 4:45 PM

Innovation Cocktail Hour: Partners and Product Showcase

Deer Creek Ballroom, Lake Level

4:45 PM – 6:15 PM

Dinner and Evening at River Bottoms Ranch

Depart Grand Hyatt Deer Valley,

Event Entrance on Lake Level

6:00 PM – 9:00 PM

6:00 p.m. - 6:30 p.m. Transfers to the venue.

Return shuttles will be available at 7:15 p.m., 8:15 p.m. and 9:00 p.m.

Outdoors - light jacket recommended.

Wednesday, September 24

Breakfast

Deer Creek Ballroom, Lake Level

6:15 AM – 7:45 AM

Kickoff

Jordanelle Ballroom, Lake Level

8:00 AM – 8:10 AM

Led by Lauren Manchester

Guest Speaker: Dr. David Fajgenbaum

Jordanelle Ballroom, Lake Level

8:10 AM – 8:50 AM

The fascinating story of how one young physician saved his own life and now uses groundbreaking AI to heal patients

Innovation + Trust Keynote - Part 1

Jordanelle Ballroom, Lake Level

8:50 AM – 9:20 AM

Led by Jack Lynch and Jon Ruggiero

Break

9:20 AM – 9:35 AM

Innovation + Trust Keynote - Part 2

Jordanelle Ballroom, Lake Level

9:35 AM – 10:15 AM

Led by Jeremy Hittle, Bryan Fixel, and Alex Benke

Fireside Chat: Scott Sandell

Jordanelle Ballroom, Lake Level

10:15 AM – 10:40 AM

A conversation with one of the most successful tech company investors over the last 30 years.

Wednesday, September 24 - continued

Break

10:40 AM – 10:55 AM

Product Kiosks

Jordanelle Foyer, Lake Level

10:55 AM – 12:20 PM

Hands-on Office Hours with Ridgeline Product Experts

Back Office Breakout: How Your Peers Are Optimizing Period End

Strawberry Room, Lake Level

10:55 AM – 11:30 AM

Led by Ridgeline's product experts and featuring Ridgeline customers

Front Office Breakout: Unlocking Tax Efficient Strategies in Ridgeline

Jordanelle Foyer, Lake Level

10:55 AM – 11:30 AM

Led by Ridgeline's product experts and featuring Ridgeline customers

Break

11:30 AM – 11:45 AM

Back Office Breakout: How to Take Your Data Strategy from Good to Great

Strawberry Room, Lake Level

11:45 AM – 12:20 PM

Led by Ridgeline's product experts and featuring Ridgeline customers and partners

AI Breakout: Real-Life with AI: Boons and Blockers

Jordanelle Ballroom, Lake Level

11:45 AM – 12:20 PM

A panel featuring Ridgeline customers

Grab'n Go Lunch

Deer Creek Ballroom, Lake Level

12:20 PM – 1:30 PM

Box lunches will be provided.

Wednesday, September 24 - continued

Choice of Activity

Depart Grand Hyatt Deer Valley,

Event Entrance on Lake Level

12:50 PM – 5:00 PM

Refer to Activity Confirmation provided at check-in for specific timing and other details.

Party at the Utah Olympic Park

Depart Grand Hyatt Deer Valley,

Event Entrance on Lake Level

5:45 PM – 9:00 PM

5:45 p.m. – 6:15 p.m. Transfers to Utah Olympic Park.

Return shuttles will be available at 7:30 p.m., 8:00 p.m. and 9:00 p.m.

Outdoors - light jacket recommended.

Breakfast

Deer Creek Ballroom, Lake Level

6:15 AM – 7:45 AM

Kickoff

Jordanelle Ballroom, Lake Level

8:00 AM – 8:20 AM

Led by Jack Lynch

Panel Discussion: Handling Complex Needs and Asset Classes

Jordanelle Ballroom, Lake Level

8:20 AM – 9:00 AM

Led by Ridgeline’s product experts and featuring Ridgeline customers

Break

9:00 AM – 9:15 AM

Innovation at Elevation: Final Showcase

Jordanelle Ballroom, Lake Level

9:15 AM – 10:15 AM

See your team’s ideas brought to life by Ridgeline engineers after just 48 hours

Customer Appreciation Ceremony & Closing Remarks

Jordanelle Ballroom, Lake Level

10:15 AM – 11:00 AM

Ridgeline Executive Team
