

## Tier1 Conference Management: A Buy-Side Conference Management Platform

No other solution has the breadth of capabilities specifically created for the investment professional and their counterparts like Tier1 Financial Solutions.

Tier1 has a comprehensive suite of products, including interactions management and corporate access tools that unlock efficiencies and create collaboration across the firm.

Teams who utilize Tier1 to facilitate their conferences see an uptick in productivity and implement end-to-end conference scheduling, communication and workflow enhancements. With Tier1's rich functionality, coordinators and corporate access professionals manage meetings, field trips, non-deal roadshows and conferences with ease.



## Investment management firms can harness a comprehensive, end-to-end solution, providing their investment professionals a seamless, integrated experience.



### CALENDAR & CORPORATE ACCESS

Streamline event management and corporate access workflows from origination to team collaboration through to logistics.

- Non-Deal Roadshows and Conferences
- Full Itinerary Planning
- Reports & Dashboards



### CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Manage meaningful interactions with Brokers and Corporates in real-time with historical data to provide analysis.

- Interactions tracking management for all activity types
- Timely evaluation of interactions to inform a more accurate broker vote



### PARTNER INTEGRATIONS

A proven track record of successful vendor partnerships.

- Pre-integrated vendor: Refinitiv's Street Events<sup>1</sup>
- Meeting Room Reservation Management
- Account & Contact Data Feeds
- Open Architecture to integrate with other vendors



### TIER1 FOR OUTLOOK®

Fully integrated with Outlook®, so users have access to a familiar workflow. Outlook® integration brings scheduling and communication tools directly to all participants.

- Event syncing from Outlook® invitations to the Tier1 Events Calendar
- Increased user adoption and usability



### INTEGRATION ENGINE

Conference management tool can be used in conjunction with other Corporate Access Events. Users can connect to the Tier1 CRM platform or other external vendors.

- API Data Feeds
- Exchange Calendar Sync



### REPORTING & DASHBOARDS

Manage your data and interactions in one place.

- Capture all interactions for data mining & presentation value
- Ensure data integrity and mining & timeliness
- Eclipse the dependency on others to provide you consumed services

<sup>1</sup> Requires a subscription to Refinitiv's Street Events; separate fees apply