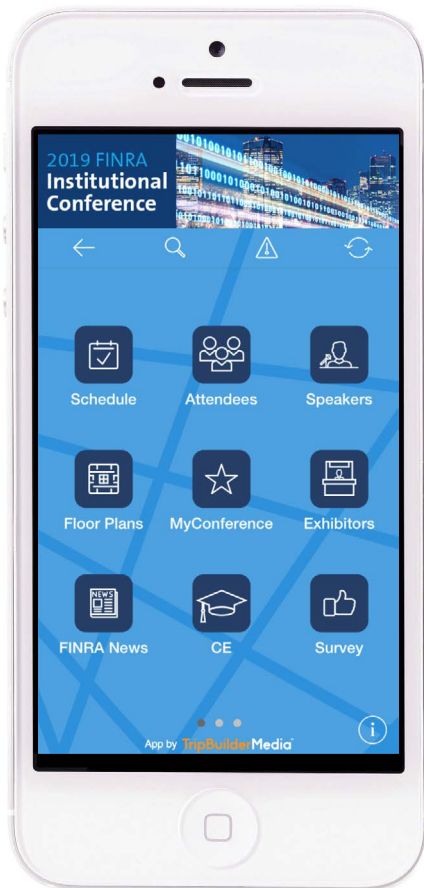


App Tip Sheet | Institutional Conference

Registered attendees are granted access to the FINRA Institutional Conference app. All materials—including session presentations, handouts and the conference schedule—are available through it.



App | Log in:

1. Go to the App store on your mobile device (Google Play Store/iTunes App Store).
2. Search for “FINRA’s Events” and then download the app.
3. When the download is complete, open the app.
4. Enter your user ID (the email address you used to register for the conference) and password (finra1939). If you have previously logged into the app and changed your password, the same password will apply.
5. Click on the “Events” icon and then select “Institutional Conference.”

App | Functionality

Within the app, you can navigate the conference venue, complete the survey and network with other conference attendees.



Schedule: See the full conference schedule and browse sessions. Select a specific session to access the session description, speaker information and associated materials; ask session-specific questions; participate in polling; and take notes.

- ▶ **Polling:** To participate in polling, under the “Schedule” icon, select the session name, and then tap the “Polling” button.
- ▶ **Session Questions:** To ask a question through the app, select the session name under the “Schedule” icon and tap on the “Ask” button. This will then prompt you to submit your question via email.



Attendees: Search for a specific person or sort the entire attendee list by name or company. Email other attendees using the “Let’s Meet” or “Email” icons on the attendee’s details page.



Speakers: See a list of the conference speakers. Search for a speaker or tap the speaker’s name to see his or her bio, photo and all of the sessions where the speaker is presenting.



MyConference: Mark sessions, attendees, exhibitors, etc., as favorites by tapping the “○” (iPhone) or “□” (Android) icon next to each name. From MyConference, you can view your personalized schedule, contacts and your notes.

- ▶ **Emailing Options:** You can email information to yourself—like notes and contact info—through the app from MyConference. Tap the “Export” button in the upper right corner, then select the items to export, next tap “Send,” and then enter your email address.



MyProfile: Enter your contact information through the “MyProfile” icon by tapping on the edit button in the upper right corner. You can choose the information you wish to make public to attendees or keep private and save.



Floor Plans: The “Floor Plans” section provides a hotel floor plan for the space—use this to easily find the locations of sessions and the exhibitors you want to visit.



Survey: Submit feedback on the overall experience via the “Survey” icon on the app home page. Please note: Once you start the survey, if you navigate away from the page, your answers will not be saved.



CE: Learn about continuing education credits offered at the Institutional Conference.



FAQs: Review answers to the most frequently asked questions.



FINRA News: Easily find FINRA news, reports and updates by tapping the FINRA News icon.

HELP: For assistance with the app, visit the App/CE table at the conference.

Welcome to the 2019 Institutional Conference App

We hope you enjoy using our FINRA
Institutional Conference app to help
you get the most out of our event.
Take a quick look at these helpful
app tips.



SKIP

NEXT



Personalize It

Mark sessions, attendees, etc., as a favorite by tapping the “O” icon (iPhone) or “□” (Android) next to their name. From MyConference, you can view your personalized schedule, contacts and your notes.



PREV

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Note It

Take notes on sessions, speakers, etc. Export your notes and lists by selecting "MyConference," tapping "Export" in the upper right, selecting the items to export, tapping "Send," and entering your email.



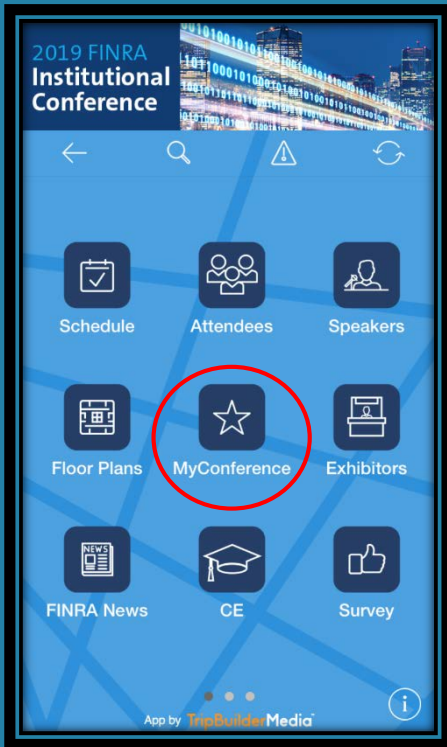
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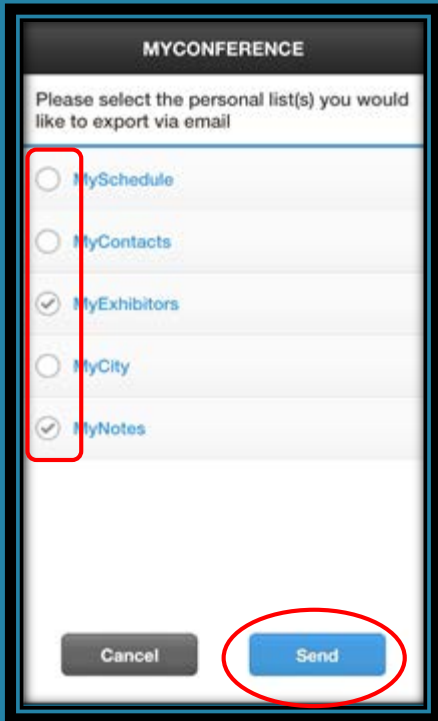
Example

2. Tap Export



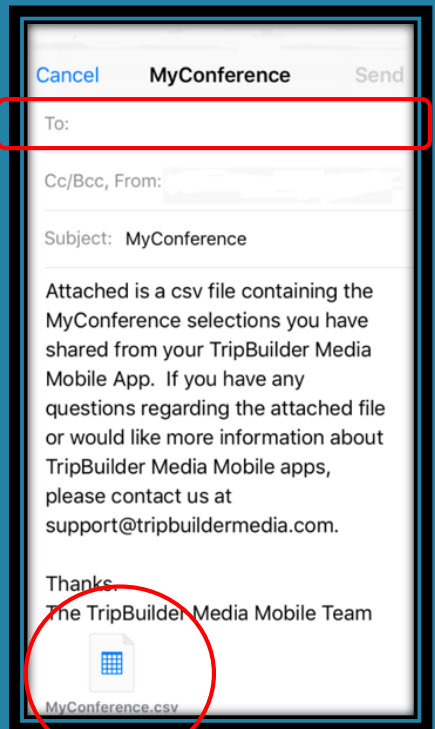
1. Select MyConference

Example Continued



3. Select items
& Tap send

4. Enter email





Map It

Easily find sessions by tapping the "Map It" icon located next to their names.



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Export It

To view handouts for a session, tap the "Handout" icon on the session detail screen (icon only appears if there is a handout). To export handouts, tap the "Export" icon on the handouts listing page.



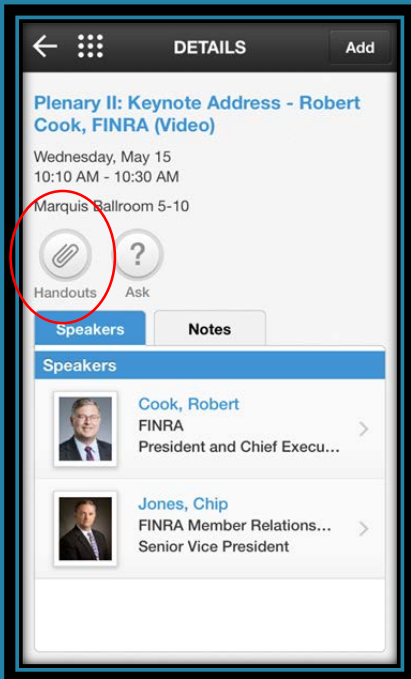
PREV

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Example

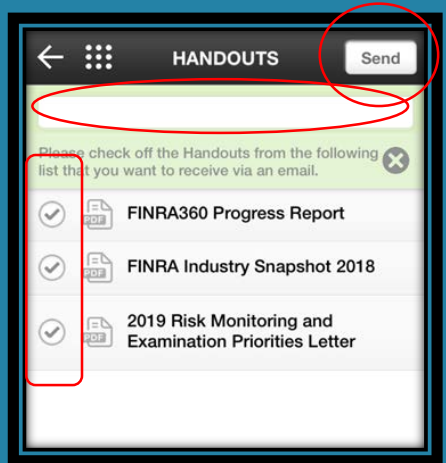
1. Select Handouts



2. Tap Export



3. Select items, enter email & Tap send





Rate It

Share your feedback with us by completing our in-app survey. To access, tap the "Survey" icon on the home screen. Please note: Once you start the survey, if you navigate away from the page, your answers will not be saved.



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Ask It

Ask session-specific questions by going to "Schedule" > Session name and tapping the "Ask" button at the top of the session details page.



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Get Continuing Education Credits for It

This conference is eligible for CFP,
CLE and CRCP CE credits. Tap on
the CE Icon to learn more.



PREV

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Poll It

Some sessions will have polling. To participate, go to "Schedule" > Session title and tap on the "Polling" button at the top of the session details page.



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FINRA News

Easily find FINRA news, reports and updates by tapping on the "FINRA News" icon.



PREV

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Sync It

When there's new info, you'll know. Simply tap the "Sync" icon located on the upper right of your home screen when you see the red "Sync" badge appear.



PREV

SKIP

DONE

Example

