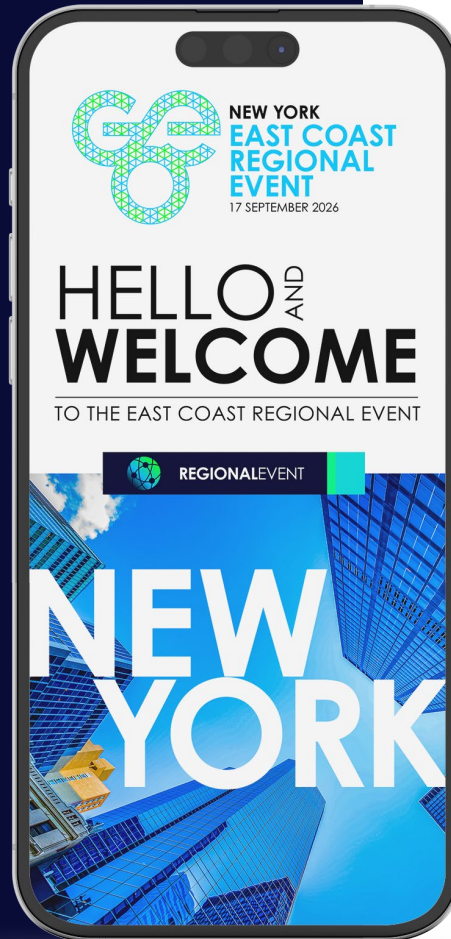


A GUIDE TO THE OFFICIAL EVENT APP

FOR ATTENDEES, SPEAKERS AND
SPONSORS



ARE YOU CONNECTED?



NEED WIFI?

SSID: **guest-wifi**

Username: **7762**

Password: **nK8572**

Then open a browser and go to:
www.morganstanley.com





ACCESS THE APP AND GET STARTED

It's easy to download the app and sign in

STEP 1 – ACCESSING THE APP

The app is **available on your desktop or to download** from either the App Store or Google Play.

To get started, simply click the link below from your mobile device:

[GEO EAST COAST REGIONAL EVENT 2026- APP](#)

Alternatively, you can scan the QR code below using your device's camera.



STEP 2 – GETTING STARTED

Open the app and log in using the **email address you used to register** for the event and the **passcode** provided in your 'Know Before You Go' pre-event email from us.

This passcode will serve as your password for the entire duration of the event and will remain the same throughout.

If you haven't attended a GEO event before, you will also receive the passcode to your registered email address.

Read the Terms and Conditions and check the box to agree.

Enter the email address you provided during event registration.

E-mail

Enter email address

☐ Please accept the [Terms & Conditions](#)

Continue



Problem logging in?

[contact support](#)



If you have any trouble logging in, please contact [Mary Potter](#) for assistance.



WHAT'S IN THIS GUIDE?



GLOBAL EQUITY ORGANIZATION
the future of global employee compensation

REGIONALEVENT



ALL ATTENDEES

Access the app and get started
Edit your personal profile
Create your own agenda
Play to win – gamification

Qualify for CPE
View your bookmarks
Networking, messages and photos

SPEAKERS

Update your speaker profile
Lead gen opportunities
View your company dashboard

SPONSORS AND EXHIBITORS

Manage your company profile
Collect and retrieve attendee leads
Export your profile activity analytics



NEED HELP?

If you have questions or need support, you can reach out to **Mary Potter** at mary.potter@globalequity.org or visit the **GEO Help Desk**.

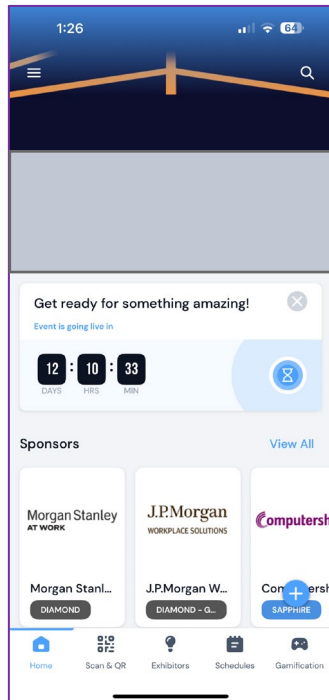


EDIT YOUR PERSONAL PROFILE

Add personality to your in-app profile

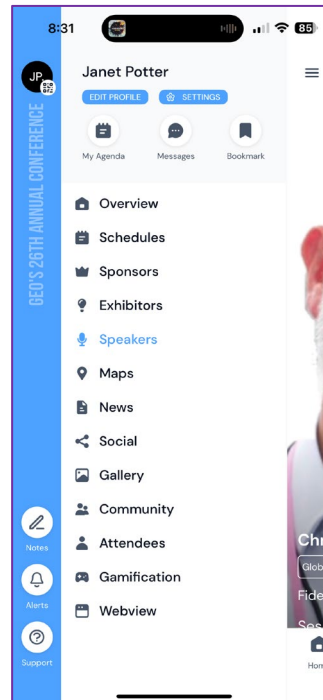
STEP 1 – ACCESS THE MENU

Click on the 3 lines to reveal the full menu.



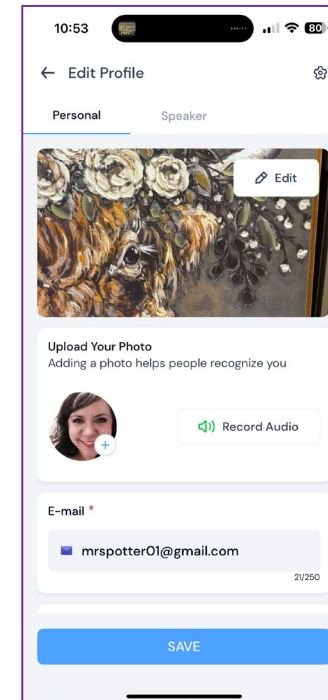
STEP 2 – CLICK EDIT PROFILE

The first item at the top of the menu.



STEP 3 – CLICK EDIT PROFILE

Check that your existing information is correct and add as much information as you'd like to share – a profile picture, background image, your bio, your interests. Click **SAVE**.





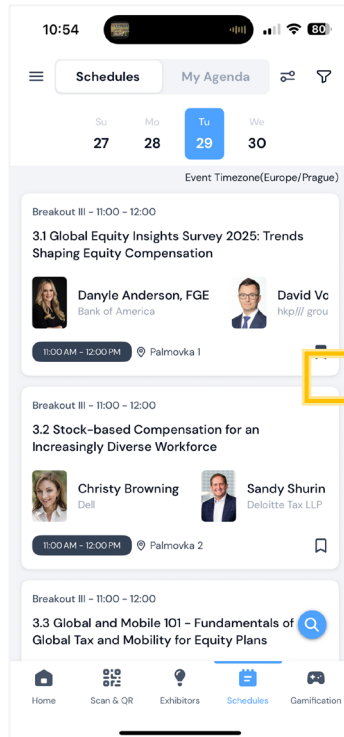
CREATE YOUR OWN AGENDA

Create your own agenda in the app and receive session reminders



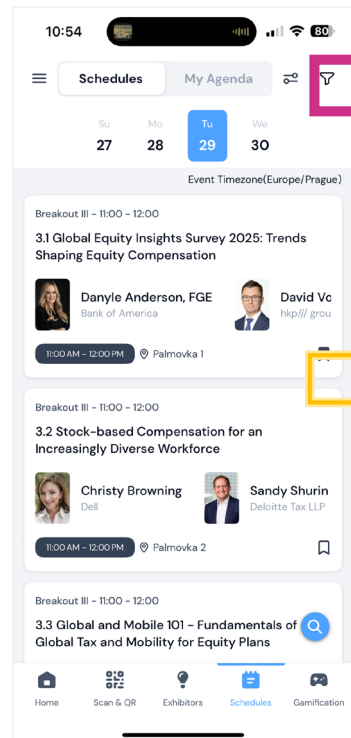
STEP 2 – CLICK EDIT PROFILE

Bookmark the sessions you are interested in.



STEP 2 – CLICK EDIT PROFILE

Bookmark the sessions you are interested in.

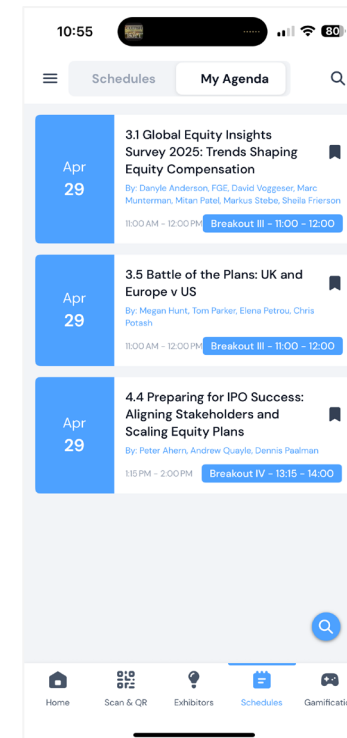


PRO TIP!

Use the filter icon to search by keyword and quickly find the topics that matter most to you.

STEP 3 – CLICK EDIT PROFILE

Click on **My Agenda** to review your saved sessions.



GOOD TO KNOW!
Sessions are color-coded by type:

REGISTRATION

ISSUER-ONLY EVENTS

BREAKOUT SESSIONS

ALL-ATTENDEE KEYNOTES

NETWORKING

SPECIAL EVENTS

GEOfit

QUALIFY FOR CPE

Remember to check in and out of each session via the app for CPE

STEP 1 – FROM YOUR APP, CHECK IN AT THE START OF EACH SESSION AND IT WILL CHECK YOU IN

When you enter the room, find the session in your event app and click the **Check in** button to begin a record of your attendance.

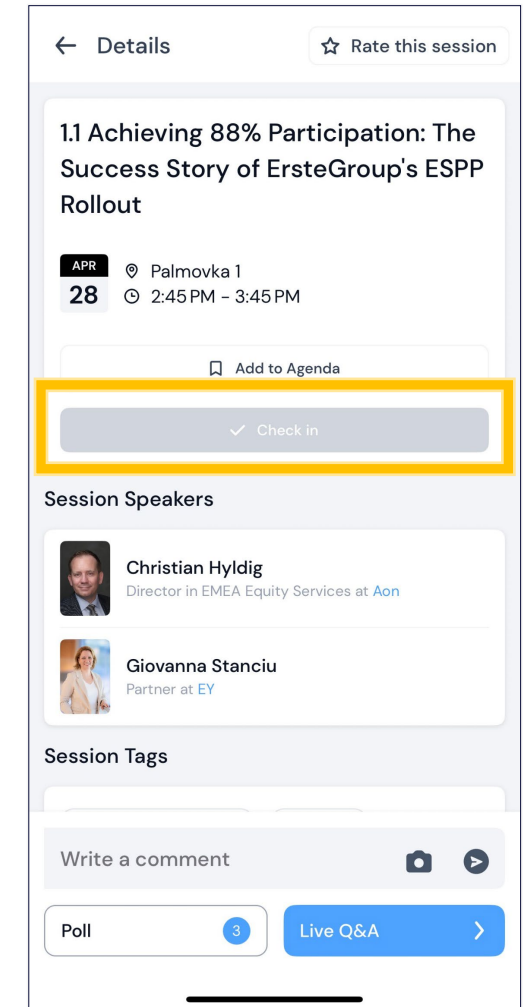
STEP 2 – CHECK OUT AT THE END OF EACH SESSION

At the end of the session, open the event app and find the session, you will already be checked-in.

You MUST select the **Checked in – Would you like to check out?** button in the session to qualify for CPE credit.

IMPORTANT

You must do this at the very **start and end** of the session to ensure your timestamp reflects the full duration of your participation.



WELCOME TO THE EVENT APP GUIDE

REGIONALEVENT



VIEW YOUR BOOKMARKS

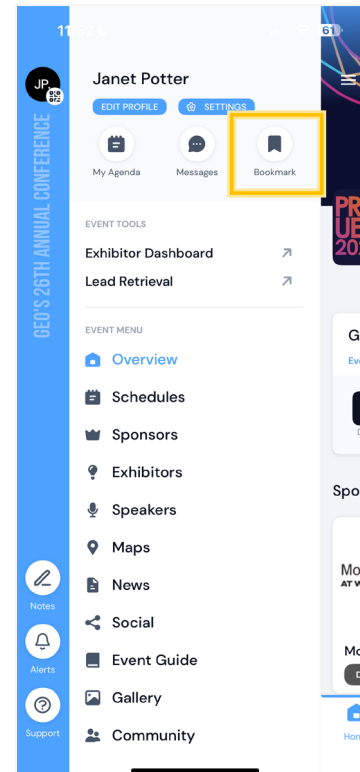
Easily access everything
You've saved –
All in one convenient place



GLOBAL EQUITY ORGANIZATION
the future of global employee compensation

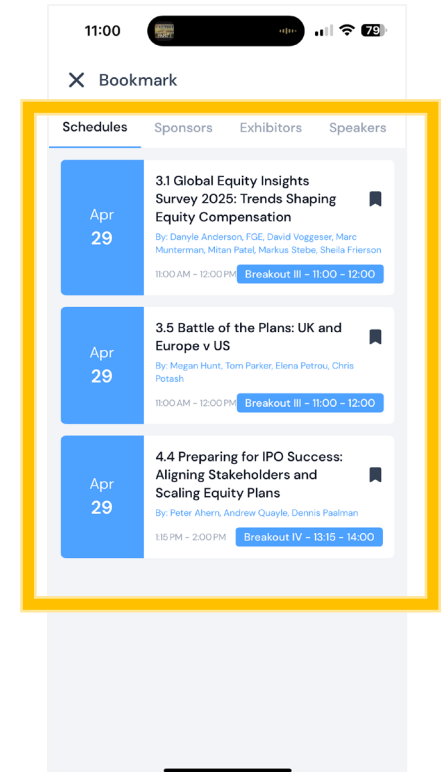
STEP 1 – ACCESS YOUR BOOKMARKS

You can view all your saved items from the Overview menu. Just tap the three lines (menu icon) on the app's home screen, then select **Bookmark**.



STEP 2 – VIEW YOUR SAVED ITEMS

From there, you'll be able to view all your bookmarks—including your schedule, as well as bookmarked Exhibitors, Sponsors, and Speakers.





NETWORKING, MESSAGES

Connect with your fellow attendees and share your experience

NETWORK WITH ATTENDEES

A - ENABLE NETWORKING

(PROVIDE CONSENT):

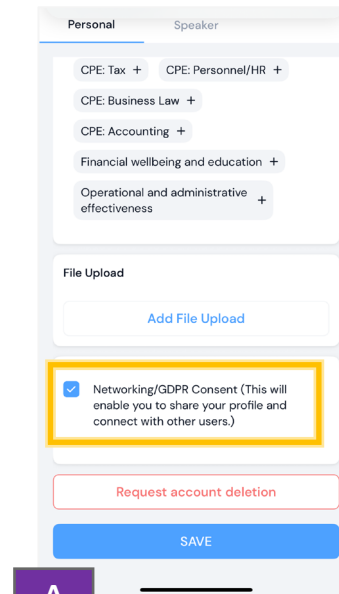
Go to **Overview > Edit Profile > Personal Profile**. Scroll to the bottom and check the box to allow networking.

B - CONNECT WITH ATTENDEES:

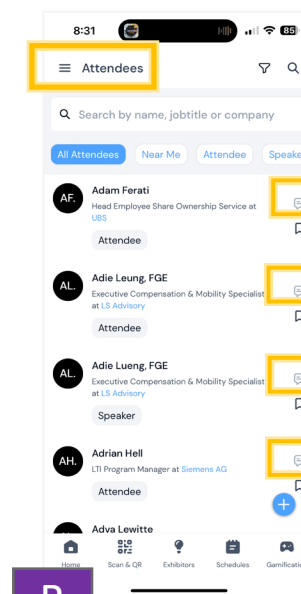
Select **Attendees** in the menu to see the full list. Tap the **message icon** next to a name to start a chat.

C - MESSAGE SPEAKERS:

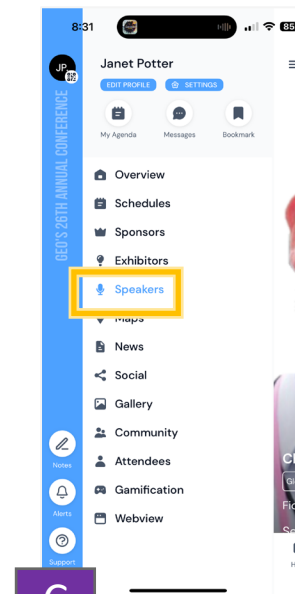
Go to **Speakers**, then tap the message icon in the top right of their photo to connect.



A



B



C



NETWORKING, PHOTOS

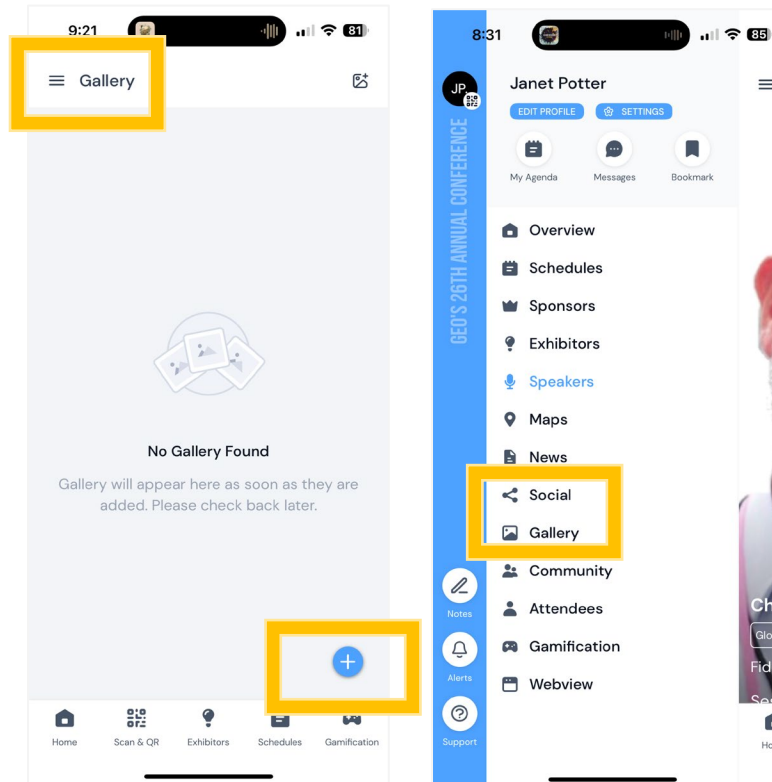
Connect with your fellow attendees and share your experience

POST PHOTOS AND COMMENTS

Go to **Gallery** or **Social** from the Overview menu.

Tap the **plus (+)** button to create a new post.

You can share photos, videos, polls, or add to the Gallery



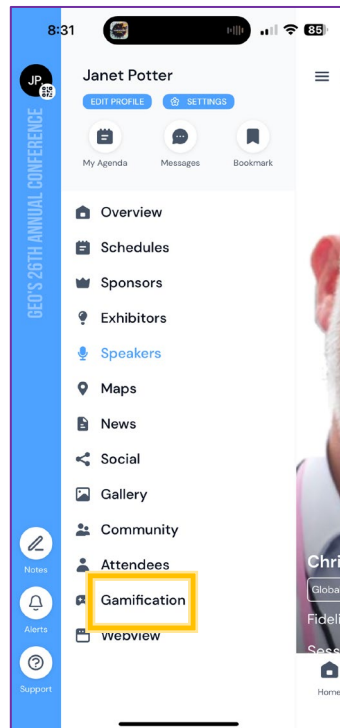


PLAY TO WIN - GAMIFICATION

The more you engage with exhibitors and explore the app, the more points you'll earn!

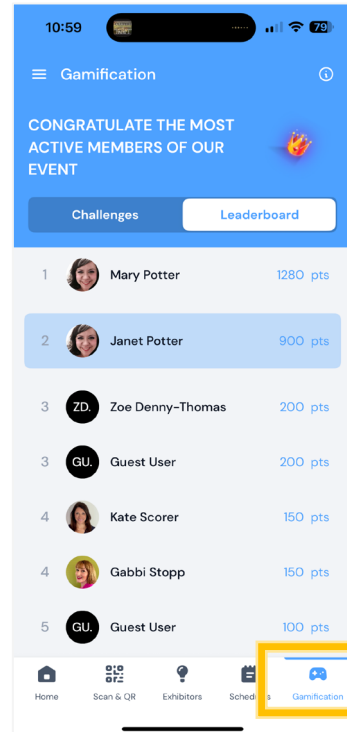
STEP 1 – VIEW THE CHALLENGES

From the overview menu, click on **Gamification**. You will see the challenges and the leaderboard



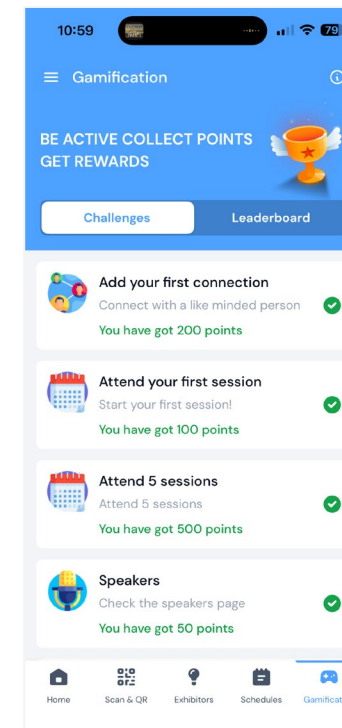
STEP 2 – VIEW THE OPPORTUNITIES

Click the Gamification at the bottom of your screen to see all the ways to earn points.

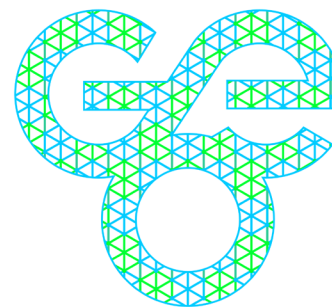


STEP 3 – PLAY TO WIN!

Collect points for attending sessions, visiting exhibitors and answering questions and make it onto the leaderboard.



W E L C O M E T O E A S T C O A S T 2 0 2 6



NEW YORK
**EAST COAST
REGIONAL
EVENT**

17 SEPTEMBER 2026

SPEAKERS

EAST COAST APP GUIDE

Speakers should familiarize themselves with the information in this section.

REGIONALEVENT





UPDATE YOUR SPEAKER PROFILE

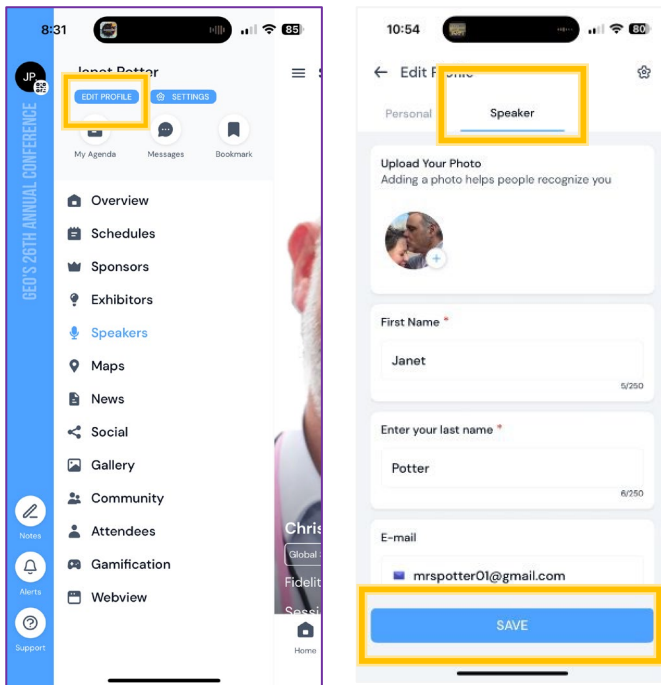
How to manage your additional speaker profile

VIEW AND EDIT YOUR SPEAKER PROFILE

As a speaker, you have two profiles: personal and speaker.

To see your speaker profile, select **Edit Profile** and tap **Speaker** at the top of the screen. Update any details you want to change.

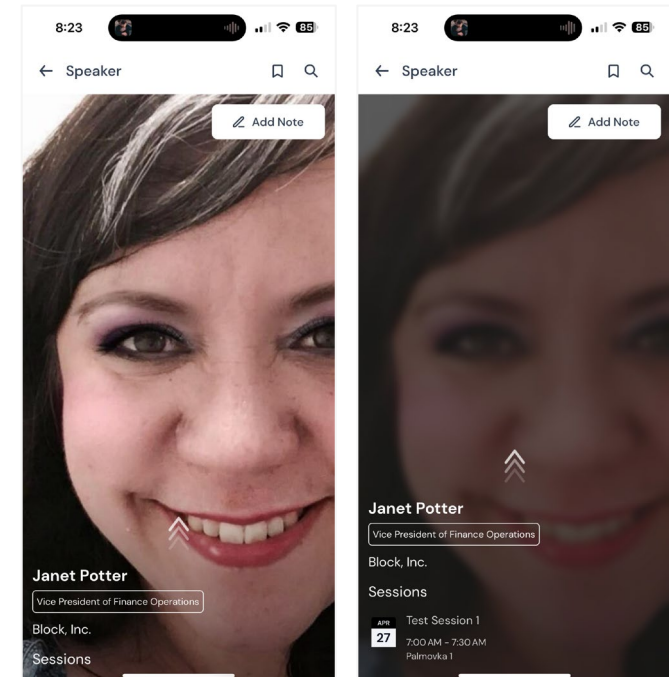
If you're also a sponsor or exhibitor, you will have those profiles to access and update, too.

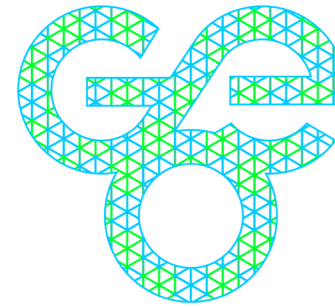


YOUR SPEAKER PROFILE LINKS TO YOUR SESSIONS

The GEO Event team has linked your sessions to your speaker profile in the app.

When attendees search for you and swipe up on your profile, they'll see your assigned sessions.





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SPONSORS AND EXHIBITORS

EAST COAST APP GUIDE

All registered attendees from sponsor and exhibitor companies can access the tools in this section.





LEAD GEN OPPORTUNITIES

OUR GAMIFICATION WILL DRIVE ATTENDEES TO YOUR PEOPLE AND BOOTH TO WIN POINTS



GLOBAL EQUITY ORGANIZATION
the future of global employee compensation

ATTENDEES WILL BE ENCOURAGED TO VISIT YOUR BOOTH FOR:

- **POINTS FOR VISITS:** Attendees earn points for visiting your booth and scanning your unique QR code. Remember to conceal your QR code when the booth is unattended.
- **POINTS FOR ANSWERS:** Attendees score points by answering your custom gamification questions.

To maximize your impact at the event, make sure to fully manage your presence in the app.

YOU CAN USE THE APP FOR:

- **LEAD SCANNING AND RETRIEVAL:** Scan attendee QR codes, rate interest, add notes, and export detailed lead records instantly.
- **REPORTING AND ANALYTICS:** Track booth visits, scans, and link clicks in real time. Access and export comprehensive activity reports.
- **ENHANCED ONLINE PROFILE:** Showcase products, documents, videos, and links, creating a central engagement hub.
- **ONLINE BOOTH EDITING:** Customize your digital booth to enhance your online presence directly within the app.



COLLECT AND RETRIEVE ATTENDEE LEADS

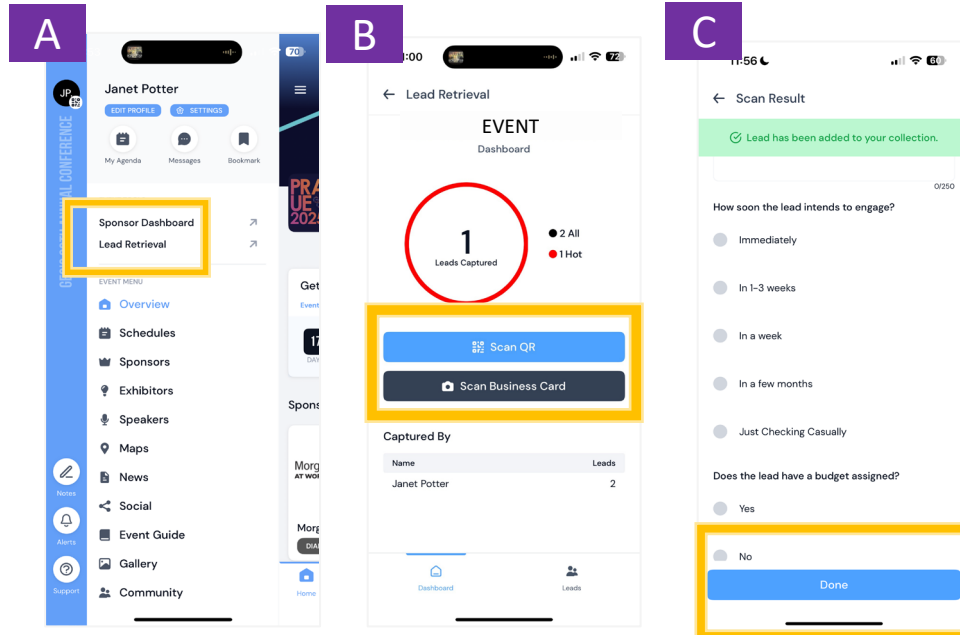
Effortless lead capture and retrieval—results made simple

STEP 1 – SCAN ATTENDEE QR CODES

A - To start scanning leads, open the flyout menu and select **Lead Retrieval** under **Event Tools**.

B - Click **Scan QR** to scan attendee badge QR codes or **Scan Business Card**.

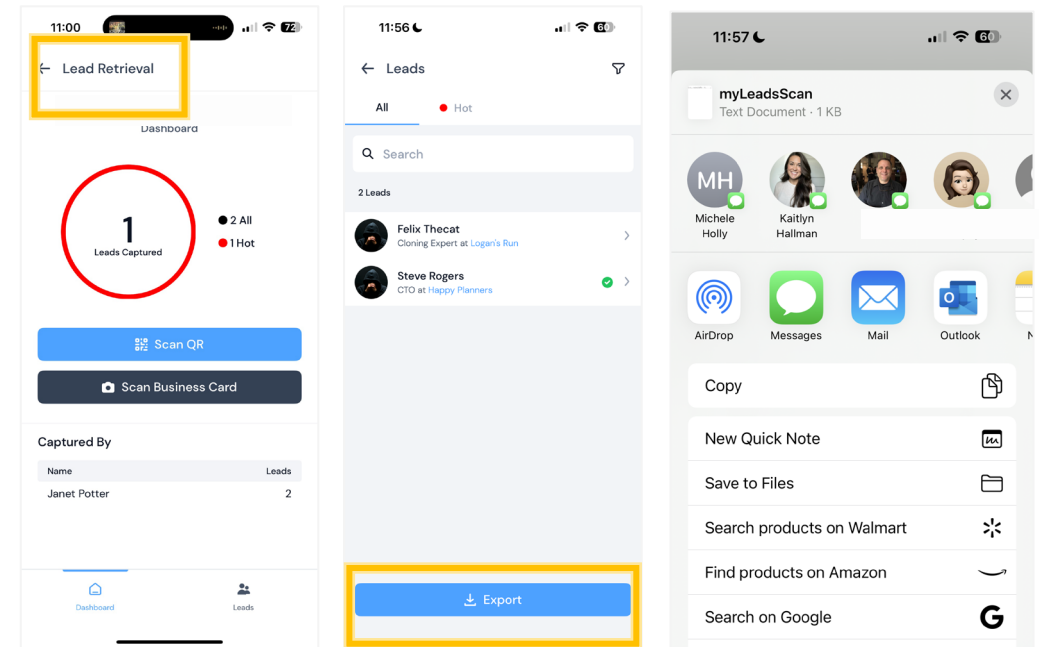
C - After scanning, you can add details like interest level, notes, and questions to help your account manager. You'll also see how many leads you've captured and who scanned them.



STEP 2 – RETRIEVE YOUR LEADS

When you're ready to export your leads, go to the Lead Retrieval Home Page and click **Leads**.

Then click **Export** to either save the leads to your device or email them to your team.





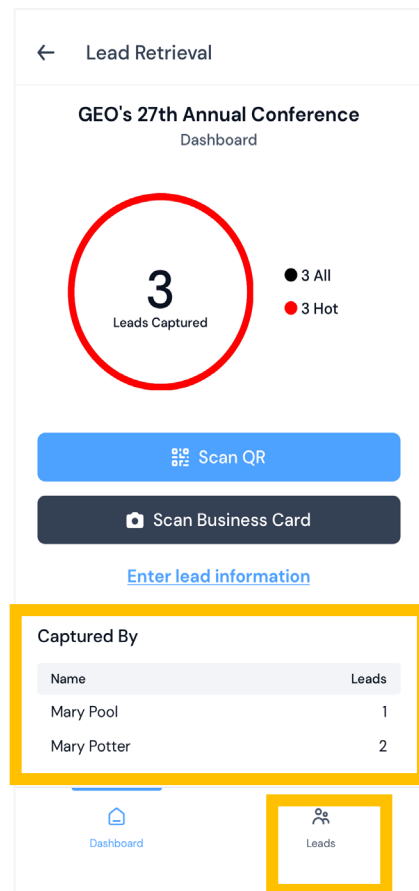
RETRIEVE TEAM LEADS

Effortless lead capture and retrieval—results made simple

OPTION 1 – ACCESS SPECIFIC TEAM MEMBER LEADS

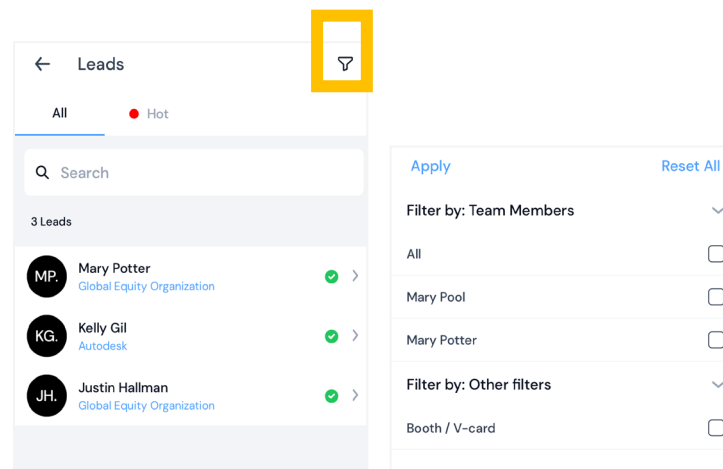
All exhibiting company attendees have access to all leads that have been scanned and can also see which team member captured each lead.

Tap on a **team member's name** or the **Leads** icon to see the specific leads they have captured.



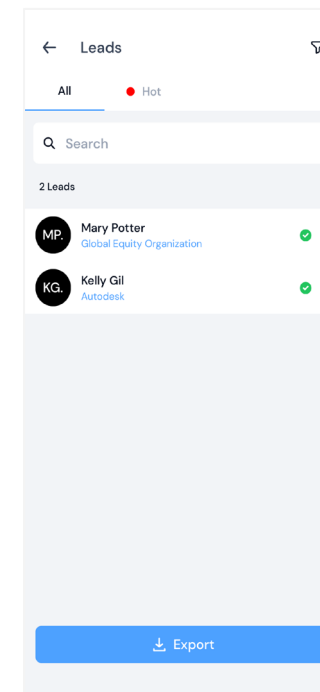
OPTION 2 - FILTER TO SELECT A TEAM MEMBER OR ALL LEADS

Select **Leads** and click the **Filter** icon to view all company leads or to select those captured by specific team members.



STEP 3 – DOWNLOAD LEADS

Select **Export** to download the leads you have selected.



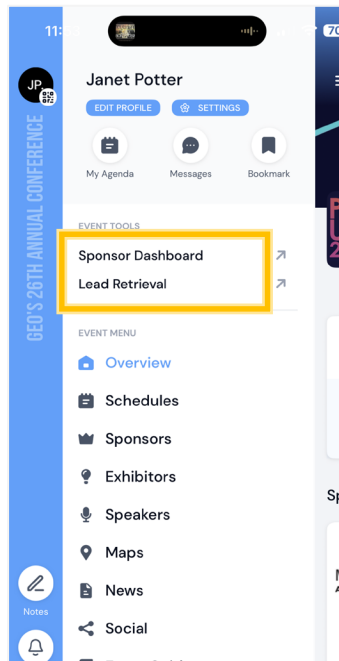


VIEW YOUR SPONSOR DASHBOARD

Manage your profile, keep track of your leads and export your data

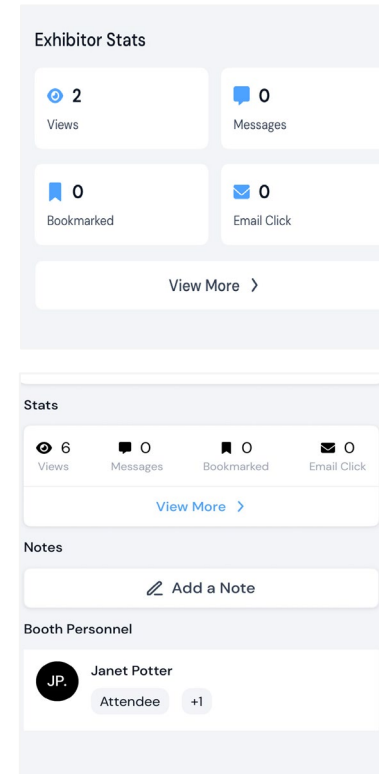
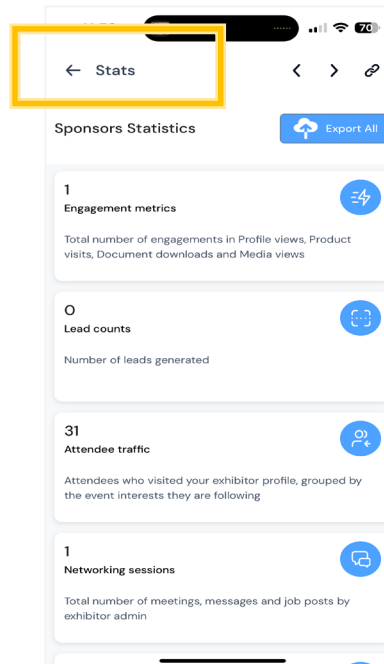
STEP 1 – ACCESS YOUR EVENT TOOLS

Tap the three lines in the top left corner to open the menu. Under **Event Tools**, select **Dashboard** or **Lead Retrieval**.



STEP 2 – VIEW YOUR DASHBOARD

Your dashboard allows you to view your profile and see and export your activity statistics.



The Dashboard and Lead Retrieval links are only visible to sponsors and exhibitors

If you believe you should have access, please see [Mary Potter](#) on the GEO Help Desk

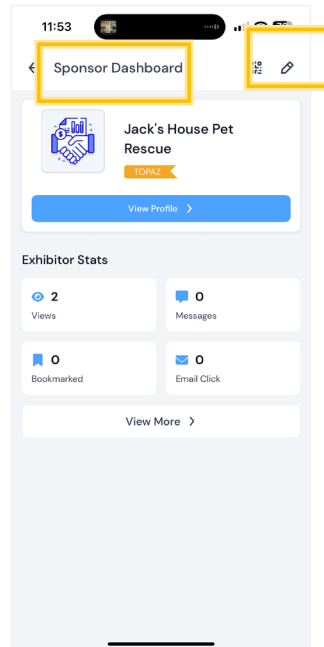


MANAGE YOUR COMPANY PROFILE

Take control of your company profile and optimize your presence

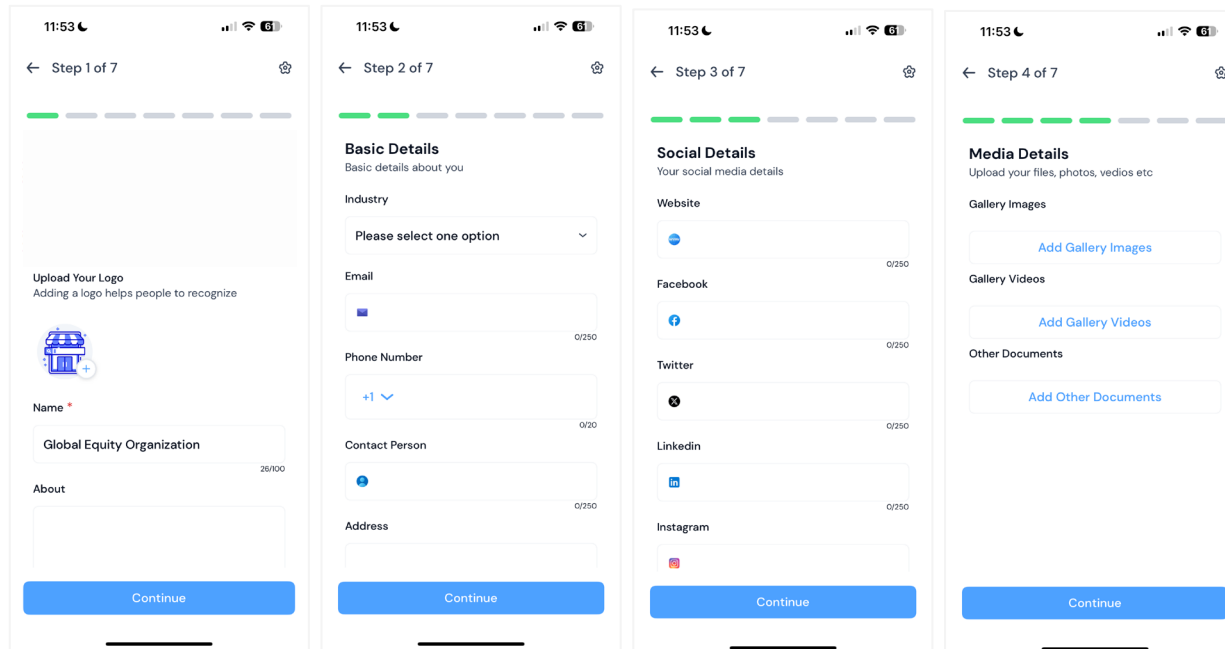
STEP 1 – ACCESS YOUR PROFILE

To edit your online booth in your **Dashboard**, click on the pencil in the right-hand corner.



STEP 2 – EDIT YOUR INFORMATION

You can add your logo, edit your company information, upload pictures, videos, documents, and other assets you may want to share with our attendees and your booth visitors. Remember to click SAVE when you have finished.



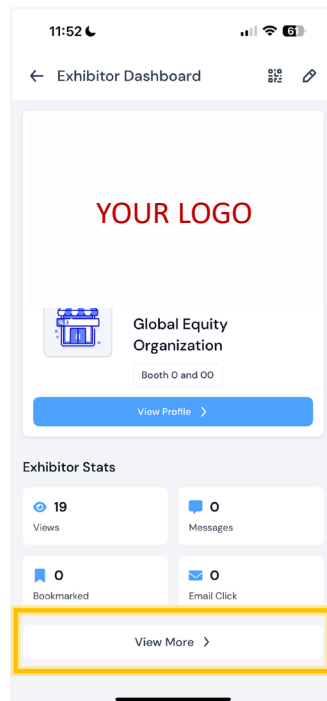


EXPORT YOUR PROFILE ACTIVITY ANALYTICS

Data to support your business case for attending the next GEO event

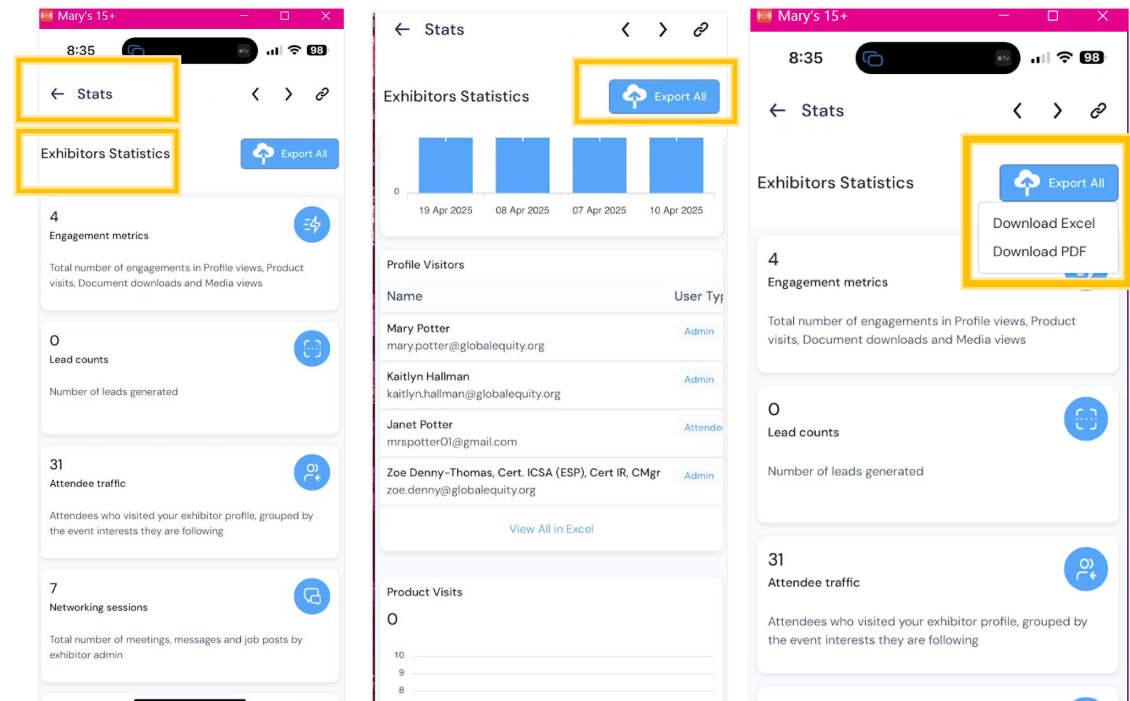
STEP 1 – ACCESS YOUR STATS

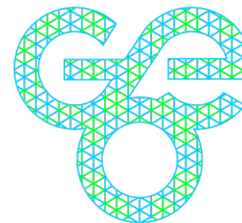
To download your stats, click on **View More** at the bottom of the **Exhibitor Dashboard**.



STEP 2 – EXPORT YOUR STATS

Easily export all available stats using the **Export All** button at the top. You can also export your stats as Excel files or download as a PDF.





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17 SEPTEMBER 2026

THANK
YOU FOR ATTENDING
THE EAST COAST REGIONAL EVENT

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