

**MEMO# 32773**

September 24, 2020

## **BDAC Meeting Notice - October 14-16, 2020**

[32773]

September 24, 2020 TO: Broker/Dealer Advisory Committee RE: BDAC Meeting Notice - October 14-16, 2020

The Investment Company Institute's Broker/Dealer Advisory Committee will meet virtually October 14-16, 2020 in four 90-minute online sessions. The dates and times are listed below (all times ET):

- Session 1: Wednesday, October 14 from 3:30 p.m. – 5:00 p.m.
- Session 2: Thursday, October 15 from 11:00 a.m. – 12:30 p.m.
- Session 3: Thursday, October 15 from 3:00 p.m. – 4:30 p.m.
- Session 4: Friday, October 16 from 11:00 a.m. – 12:30 p.m.

### **Online Meeting Registration**

To register for the Broker/Dealer Advisory Committee meeting, please visit our registration site at [www.ici.org/reg/bdac/virtual\\_mtg](http://www.ici.org/reg/bdac/virtual_mtg). Please note that the only way to register for the Committee meeting is through the Cvent link provided above.

During the registration process, you will indicate which session(s) you are attending. For those session(s) you cannot attend, you may have an alternate register and attend in your place. Following the committee's "Expectations and Guidelines" document, attendance is limited to one representative per organization for each session, unless an exception is granted by ICI. The attached agenda will assist you in knowing the contents being covered in each session.

When registering, you will be asked to provide your work email, office, and cell phone numbers. Upon confirming registration, attendees may download placeholder calendar invitations to reserve the time for each session selected. ICI will send virtual meeting details to all registered attendees on Tuesday, October 13, including links on how to access registered session(s).

### **Virtual Networking Reception**

On Wednesday, October 14, we will host a virtual networking reception from 5:00 p.m. – 6:00 p.m. ET, following Session 1. The reception will take advantage of virtual "breakout

rooms” where attendees will be able to meet in smaller groups. While registration via Cvent is required, there is no charge for the virtual networking reception. Additional details will be provided on October 13 to those registered to attend the reception.

### **Request for Shop Talk**

Please submit your “shop talk” discussion items through the Cvent registration process or email Jeff Naylor at [jeff.naylor@ici.org](mailto:jeff.naylor@ici.org) no later than Monday, October 5 to allow for antitrust review and pre-meeting distribution. Our experience indicates that shop talk topics circulated in advance of the meeting considerably enhance the discussion.

### **Agenda and Meeting Materials**

ICI will distribute the meeting agenda and related materials on Wednesday, October 7 through the ICI website. Committee members must grant “colleague access” through the website to any colleagues that require access to meeting materials.

We look forward to meeting with you in October!

Stuart Bateman  
Chair – Broker/Dealer Advisory Committee  
Franklin Templeton Investments

Jeff Naylor  
Director, Operations and Distribution

[Attachment](#)

---

Copyright © by the Investment Company Institute. All rights reserved. Information may be abridged and therefore incomplete. Communications from the Institute do not constitute, and should not be considered a substitute for, legal advice.