

**MEMO# 30983**

December 15, 2017

## **BDAC Meeting Notice - January 23-25, 2018**

[30983]

December 15, 2017 TO: Broker/Dealer Advisory Committee RE: BDAC Meeting Notice - January 23-25, 2018

The next meeting of the Broker/Dealer Advisory Committee will take place on Tuesday, January 23 through Thursday, January 25, 2017 at the offices of PIMCO Investments LLC located at 650 Newport Center Drive, Newport Beach, CA 92660.

The meetings will take place in the PIMCO's conference center with confirmation of room location to be provided. The Direct at Fund Working Group on new account processing will hold a pre-meeting on Tuesday, January 23rd from 3:00 p.m. – 5:00 p.m. PT. Additional information will be provided separately to Working Group members. All committee members are eligible to attend the pre-meeting, registration for which is incorporated with the committee meeting.

On Wednesday, January 24th, the official committee meeting will begin with continental breakfast served at 8:30 a.m. PT with the meeting beginning at 9:00 a.m. PT. Lunch will be served midday and the meeting will conclude at 5:00 p.m. PT. On Thursday, January 25th, the meeting will begin at 9:00 a.m. PT; breakfast will be available before the meeting. Lunch will be provided, and the meeting is expected to continue until approximately 2:00 p.m. PT. PIMCO observes business attire for all meetings.

Please plan to arrive at least 15 minutes prior to the start of the meeting. Attendees will show photo ID to check in and receive a security badge. Committee members will then be escorted to the meeting room. To facilitate your entrance into the building, please remember to register for the meeting.

### **Hotel Accommodations**

A block of rooms has been reserved at the Island Hotel Newport Beach located at 690 Newport Center Drive Newport Beach, California 92660 for the evenings of January 23rd and 24th. On January 23rd, the rate is \$300.00 per night. The rate drops on January 24th to \$250.00 per night. The hotel is approximately 0.3 miles from the PIMCO Office or 0.5 miles by car. To make reservations, please call the hotel at 1-949-386-8361 and request the Investment Company Institute room block or access this online using this link for the [ICI's BDAC Meeting 2018](#). ***Please make your hotel reservations as soon as possible as rooms are limited. All reservations must be guaranteed by December 29, 2017 to***

**receive the room block rate.** Reservations must be cancelled 72 hours prior to the day of arrival to avoid penalty.

## **Committee Dinner**

The Committee dinner will be held on the evening of Wednesday, January 24th, at a restaurant to be decided. The reception will begin at 6:30 pm PT and dinner will follow at 7:15 pm. PT Committee members (or their substitutes) electing to attend the dinner will pay a standard amount of \$105.00 per person (via credit card) as part of the meeting registration process. *Please note that if you confirm attendance for the BDAC dinner and cancel within 3 business days of the scheduled event, you will be charged the \$105.00.* Attire for the dinner is business casual.

## **Online Registration**

Please register for the Broker/Dealer Advisory Committee meeting and associated dinner online via Cvent at [www.ici.org/reg/bdac](http://www.ici.org/reg/bdac). ***Please note that the only way to register for the BDAC meeting and dinner is through the Cvent link above.*** If you have questions about registration, please contact Magen Dargon at (202) 326-5943 or [magen.dargon@ici.org](mailto:magen.dargon@ici.org).

## **Agenda Topics/Shop Talk**

We want your input on agenda topics and “shop talk” discussion items for the meeting. Please use the space provided in Cvent to list your ideas and suggestions or e-mail Jeff Naylor at [jeff.naylor@ici.org](mailto:jeff.naylor@ici.org). Please provide suggested agenda topics no later than Friday, December 29, 2017 and shop talk items no later than Friday, January 5, 2018. Our experience indicates that shop talk topics circulated in advance of the meeting considerably enhance the discussion.

We look forward to seeing you in Newport Beach, CA!

Stuart Bateman  
Chairman – Broker/Dealer Advisory Committee

Jeff Naylor  
Director, Operations and Distribution

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