

**MEMO# 30467**

December 9, 2016

## **BDAC Meeting Notice - January 25-26, 2017**

[30467]

December 9, 2016 TO: Broker/Dealer Advisory Committee RE: BDAC Meeting Notice - January 25-26, 2017

The next meeting of the Broker/Dealer Advisory Committee will take place on Wednesday, January 25 and Thursday, January 26, 2017 at the offices of the LPL Financial located at 4707 Executive Drive, San Diego, CA 92121.

The meetings will take place in Conference Rooms A-D of the Learning Center, located on the 2nd floor. On Wednesday, January 25, lunch will be served at noon, the meeting will begin at 1:00 p.m. and conclude at 5:00 p.m. On Thursday, January 26, the meeting will begin at 9:00 a.m. Continental breakfast will be provided before the meeting, lunch will be served at noon and the meeting is expected to continue until approximately 2:00 p.m. LPL observes business casual for committee meetings.

Please note that due to enhanced building security procedures, meeting attendees will need to check in at the lobby security desk before accessing the meeting floor. Please plan to arrive at least 15 minutes prior to the start of the meeting to avoid delay in accessing LPL offices. 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 San Diego Marriott La Jolla, 4240 La Jolla Village Dr, La Jolla, CA 92037 for the evenings of January 24th and 25th at a rate of \$269.00 per night. The hotel is approximately 0.6 miles from LPL. To make reservations, please use the link to [book the Investment Company Institute group rate.](#) ***Please make your hotel reservations as soon as possible as rooms are limited. All reservations must be guaranteed by January 3, 2017 to receive the room block rate.*** Reservations must be cancelled 24 hours prior to the day of arrival to avoid penalty.

### **Committee Dinner**

The Committee dinner will be held on the evening of Wednesday, January 25, at a location to be determined. The reception will begin at 6:30 p.m. and dinner will follow at 7:15 p.m. Committee members (or their substitutes) electing to attend the committee dinner will pay a standard amount of \$105.00 via credit card as part of the 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 Valencia Paige at (202)326-5846 or [valencia.paige@ici.org](mailto:valencia.paige@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 30, 2016 and shop talk items no later than Friday, January 6, 2017. Our experience indicates that shop talk topics circulated in advance of the meeting considerably enhance the discussion.

We look forward to seeing you in San Diego, CA!

Jeff Naylor  
Director, Operations and Distribution

Stuart Bateman  
Chairman – Broker/Dealer Advisory Committee

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