

**MEMO# 29076**

June 10, 2015

## **BDAC Meeting Notice - July 20-21, 2015**

[29076]

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TO: BROKER/DEALER ADVISORY COMMITTEE No. 27-15 RE: BDAC MEETING NOTICE - JULY 20-21, 2015

The next meeting of the Broker/Dealer Advisory Committee will take place on Monday, July 20 and Tuesday, July 21 at the offices of Charles Schwab, 9825 Schwab Way, Lone Tree, CO 80124. The Schwab offices are approximately 35 miles from Denver International Airport (DIA).

The meetings will take place in the Amenities Building located on the Charles Schwab campus. On Monday, July 20, lunch will be served at 1:00 p.m. and the meeting will begin at 2:00 p.m. and conclude at 5:30 p.m. On Tuesday, July 21, the meeting will begin at 8:30 a.m. Continental breakfast will be provided before the meeting. The meeting will conclude with lunch, which will be served at noon. Attire for the meeting is business casual. Please note that all times are in MDT Time.

Because the new Charles Schwab campus is not yet recognized by most GPS systems, and to avoid being routed to the old campus, it is recommended to use the intersection of Park Meadows Blvd. and Lincoln Ave. as your destination. Schwab Way, the entrance to the campus, is accessed from Park Meadows Blvd. and is south of Lincoln Ave. Parking is available in the surface-level visitor parking lot to the south (left) of Schwab Way and directly in front of the large parking garage. Once parked, walk west between the two large office buildings and to the rooftop garden of the Amenities Building. The main lobby (Level 02) of the Amenities Building is accessed from the rooftop garden by available stairs or elevator. The Amenities Building is a public-access space, therefore, no special security is required to gain access.

### **Hotel Accommodations**

A block of rooms has been reserved at the Element Denver Park Meadows hotel located at 9985 Park Meadows Drive, Lone Tree, CO 80124 for the evenings of July 19th and 20th at a rate of \$149.00 per night. The hotel is approximately 1.7 miles from the Charles Schwab offices. To make reservations, please call the hotel at 303-790-2100. Please make your hotel reservations as soon as possible as rooms are limited. All reservations must be guaranteed by June 24th 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 Monday, July 20, at Perry's Steakhouse and Grille located at 8433 Park Meadows Center Drive, Suite D154, Lone Tree, CO 80124. 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 Items/Committee Projects**

We want your input on agenda items, "shop talk" discussion items and future BDAC projects 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) no later than Wednesday, July 8. Our experience indicates that if topics are circulated in advance, the value of the discussion is considerably enhanced.

We look forward to seeing you in Denver!

Scot P. Hawthorne

JP Morgan Asset Management

Chairman – Broker-Dealer Advisory Committee Jeffrey A. Naylor

Director, Operations & Distribution

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