

MEMO# 31121

March 8, 2018

BDAC Meeting Notice - April 18-19, 2018

[31121]

March 8, 2018 TO: Broker/Dealer Advisory Committee RE: BDAC Meeting Notice - April 18-19, 2018

The next meeting of the Broker/Dealer Advisory Committee will take place on Wednesday, April 18 and Thursday, April 19, 2018 at the offices of DST Systems, Inc. located at 210 W 10th Street, Kansas City, MO 64105.

The meetings will take place in the DST Centennial Conference Center, rooms CT 780 A and B. On Wednesday, April 18th, the committee meeting will begin with continental breakfast served at 8:30 a.m. CT with the meeting beginning at 9:00 a.m. CT. Lunch will be served midday and the meeting will conclude at 5:00 p.m. CT. On Thursday, April 19th, the meeting will begin at 9:00 a.m. CT; breakfast will be available before the meeting. Lunch will be provided, and the meeting will conclude at approximately 1:00 p.m. CT. Dress code for the meeting is business casual.

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

Members of the Mutual Fund Profile Steering Committee will meet on Tuesday, April 17th from 1:00 p.m. – 5:00 p.m. CT. Additional information will be provided separately to Steering Committee Members.

Hotel Accommodations

A block of rooms has been reserved at the Crowne Plaza Kansas City Downtown located at 1301 Wyandotte St., Kansas City, MO 64105 for the evenings of April 17th and 18th. The rate per night is \$159.00. The hotel is approximately 0.3 miles walking from the DST Office or 0.5 miles by car. To make reservations, please call the hotel at (816) 474-6664 ext. 7500 and request the Investment Company Institute room block or access this online using this link for the [ICI's April 2018 BDAC Room Block](#) . ***Please make your hotel reservations as soon as possible as rooms are limited. All reservations must be guaranteed by March 27, 2018 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, April 18th, at a restaurant to be determined. The reception will begin at 6:30 p.m. CT and dinner will follow at 7:15

p.m. CT. Committee members (or their substitutes) electing to attend the dinner will pay a standard amount of \$115.00 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 \$115.00.* 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. ***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.

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. Please provide suggested agenda topics no later than Friday, March 23, 2018 and shop talk items no later than Friday, March 30, 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 Kansas City, MO!

Stuart Bateman
Chairman – Broker/Dealer Advisory Committee

Jeff Naylor
Director, Operations and Distribution

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