

**MEMO# 35207**

March 20, 2023

# **Registration Open: Bank, Trust Advisory Committee Meeting - May 10-11, 2023**

[35207]

March 20, 2023

TO: Bank, Trust and Retirement Advisory Committee RE: Registration Open: Bank, Trust Advisory Committee Meeting - May 10-11, 2023

The next meeting of the Bank, Trust, Retirement Advisory Committee will be held on Wednesday, May 10 from 1:00 to 5:00 p.m. ET and on Thursday, May 11 from 9:00 a.m. to Noon ET. The in-person meeting will take place at the 610 Market St, Philadelphia, PA 19106 hosted by Macquarie. The option to attend virtually is available. Lunch will be served on the first day of the meeting starting at noon and a continental breakfast and lunch on day two. Attire for the meeting is business casual.

## **Hotel Accommodations**

There is no room block for meeting however here are two suggestions which are close to the office location.

Kimpton Hotel Monaco (0.2 mile from meeting) [Kimpton Link](#)

Renaissance Philadelphia Downtown (0.3 miles from meeting ) [Marriott Link](#)

## **Committee Dinner**

The committee networking event will be held on Wednesday, May10 at the Macquarie office on the rooftop. Committee members (or their substitutes) electing to attend the networking event will pay an amount of \$140.00 per person (via credit card) as part of the meeting registration process and will be responsible for their own transportation to and from the event. Please note cancellations must be made three business days in advance of the event to receive a refund of your payment. Attire for the event is casual.

## **Online Meeting Registration**

To register for the Bank, Trust, Retirement Advisory Committee meeting and networking event, please visit our registration site: [registration link](#). Please note that the only way to register for the Bank, Trust, Retirement Advisory Committee meeting and networking event is through the link indicated above. If you have questions about registration, please contact Magen Rauch at 202-326-5943 or ([magen.rauch@ici.org](mailto:magen.rauch@ici.org)).

## **Agenda Suggestions & Roundtable Topics**

We would like your input on agenda topics and "roundtable" discussion items for the meeting. Please use the space provided during the online registration to list your ideas and suggestions or email John Randall ([john.randall@ici.org](mailto:john.randall@ici.org)) or Magen Rauch ([magen.rauch@ici.org](mailto:magen.rauch@ici.org)) by May 1. 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 person in Philadelphia, PA.

Teresa Sloan-Yancik  
Chair - Bank, Trust and Retirement Advisory Committee  
Vanguard Funds

John Randall  
Director, Operations and Distribution

---

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.