

BDUG
2015 Annual Meeting Agenda
Sandpearl Resort – Clearwater Beach, FL
September 20 – 23, 2015

Sunday, September 20

5:00 p.m. – 6:30 p.m.	2015 Annual Meeting Registration & Opening Reception <i>Sponsor: BDUG</i> *Lite Hors d'oeuvres and cocktails Please see www.bdug.org for Annual Meeting Registration details	Pool Lawn (Cove if inclement weather)
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Monday, September 21

8:00 a.m. – 9:00 a.m.	Breakfast with Exhibitors – <i>Sponsor: Broadridge/Matrix</i>	Harbor C
9:00 a.m. – 9:30 a.m.	General Session: BDUG Steering Committee Welcome & DTCC Introductions	Harbor A & B
9:30 a.m. – 10:15 a.m.	General Session: Global Regulatory Reform Larry Thompson – DTCC Vice Chairman, and General Counsel	Harbor A & B
10:15 a.m. - 10:30 a.m.	Exhibitor Presentation: <i>Globe Tax</i>	Harbor A & B
10:30 a.m. – 11:00 a.m.	Visit / Refreshments with Exhibitors	Harbor Foyer
11:00 a.m. - 12:00 p.m.	General Session: Keynote Address Donna Milrod – DTCC Managing Director, and Head of DTCC Solutions	
12:00 p.m. – 12:15 p.m.	Exhibitor Presentation: Broadridge/Matrix	Harbor A & B
12:15 p.m. – 1:15 p.m.	Lunch	Harbor C

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1:15 p.m. – 2:00 p.m.	Federal Reserve Update Chris Burke , VP & Head of Fedwire Securities Service	Harbor A & B
2:00 p.m. – 2:15 p.m.	Exhibitor Presentation: CUSIP Global Services	Harbor A & B
2:15 p.m. – 2:30 p.m.	Visit / Refreshments with Exhibitors	Harbor Foyer
2:30 p.m. – 4:00 p.m.	Panel Discussion – U.S. Regulatory Reform – Moderator – John Randall, Reliance Trust Company, Senior Vice President <ul style="list-style-type: none"> • Money Market Fund Reform <ul style="list-style-type: none"> ○ James Kiernan – DTCC Vice President, Relationship Management ○ Bud Person – Federated Investors, Executive Vice President • Dodd Frank Initiatives • U.S. Regulatory Environment <ul style="list-style-type: none"> ○ Patricia Dalton, OCC Risk Specialist 	Harbor A & B
5:00 p.m. - 6:00 p.m.	Cocktails	Gulf Lawn
6:00 p.m. – 8:00 p.m.	BDUG Dinner	(Cove if inclement weather)
Tuesday, September 22		
8:00 a.m. - 9:00 a.m.	Breakfast with Exhibitors - <i>Sponsor: GBST</i>	Harbor C
9:00 a.m. - 9:45 a.m.	General Session: Collateral Management and DTCC Margin Transit Utility Update – <ul style="list-style-type: none"> • Mark Jennis, DTCC Managing Director, Product Management 	Harbor A & B
9:45 a.m. - 10:30 a.m.	General Session: BDUG Membership Town Hall Mike Reardon, State Street, BDUG Vice Chairman	Harbor A & B

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10:30 a.m. - 11:00 a.m.	Visit / Refreshments with Exhibitors	Harbor Foyer
11:00 a.m. - 12:00 p.m.	General Session: OCC Update <ul style="list-style-type: none"> ○ Patricia Dalton, OCC Risk Specialist 	Harbor A & B
12:00 a.m. – 12:15 p.m.	Exhibitor Presentation: Tata Consultancy Services (TCS)	Harbor A & B
12:15 p.m. - 1:15 p.m.	Lunch	Harbor C
1:15 p.m. – 2:30 p.m.	General Session: T+2 – Presentation and Question and Answer <ul style="list-style-type: none"> • John Abel – DTCC Vice President, Product Management • Greg Johnston – DTCC Vice President, Product Management 	Harbor A & B
2:30 p.m. – 2:45 p.m.	General Session:	Harbor A & B
2:45 p.m. – 3:00 p.m.	Visit / Refreshments with Exhibitors	
3:00 p.m. – 4:00 p.m.	General Session: DTCC Corporate Actions Update A progress report on the corporate actions transformation project timeline milestones and an outline of 2016 Asset Services developments. <ul style="list-style-type: none"> • Chris Scotto, DTCC Director, Product Management 	Harbor A & B
5:00 p.m. – 6:00 p.m.	Exhibitor Reception & Raffle	Harbor Foyer

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Wednesday, September 23		
8:00 a.m. – 9:00 a.m.	Breakfast with DTCC Management – Join members of DTCC's Global Operations & Client Services Organization for breakfast and small group Q&A sessions	Harbor A & B
9:00 a.m. – 10:30 a.m.	General Session: MMI Optimization <ul style="list-style-type: none"> • Bob Cavallo – DTCC Director, Product Management • Kim Oquindo – DTCC Analyst, Product Management 	Harbor A & B
10:30 a.m. – 11:00 a.m.	Conference Recap, Door Prizes & Adjournment	Harbor A & B

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