

BDUG
2014 Annual Meeting Agenda
Sandpearl Resort – Clearwater Beach, FL
September 21 – 24, 2014

Sunday, September 21

5:00 p.m. – 7:00 p.m.	2013 Annual Meeting Registration & Opening Reception <i>Sponsor: BDUG</i> Please see www.bdug.org for Annual Meeting Registration details	Pool Lawn (Cove if inclement weather)

Monday, September 22

7:30 a.m. - 8:30 a.m.	Breakfast with Exhibitors – <i>Sponsor:</i>	Cove
8:30 a.m. – 9:00 a.m.	General Session: BDUG Steering Committee updates & DTCC Introductions	Harbor A & B
9:00 a.m. - 9:35 a.m.	General Session: Keynote Address – Timothy Keady, DTCC Chief Client Officer	Harbor A & B
9:35 a.m. – 9:50 a.m.	General Session: Exhibitor Presentation – Globe Tax	
9:50 a.m. - 10:15 a.m.	Visit / Refreshments with Exhibitors – Sponsor: BDUG	Harbor Foyer
10:15 a.m. - 10:45 a.m.	General Session: Road Map for Promoting Intraday Settlement Finality in U.S. Markets: Shorten Settlement Cycle – John Abel, Vice President, DTCC Product Management	Harbor A & B
10:45 a.m. – 11:15 a.m.	General Session: Road Map for Promoting Intraday Settlement Finality in U.S. Markets: (continued) Improve Industry Affirmation Rates (A building block for SSC) - Greg Johnston, Manager, DTCC Product Management	Harbor A & B

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11:15 a.m. – 12:00 p.m.	General Session: Road Map for Promoting Intraday Settlement Finality in U.S. Markets: (continued) MMI Optimization - Robert Cavallo, Director, DTCC Product Management Kimberly Oquindo, Analysis, DTCC Product Management	Harbor A & B
12:00 p.m. – 12:15 p.m.	General Session: Exhibitor Presentation – SunGard	Harbor A & B
12:15 p.m. – 1:15 p.m.	Lunch	Cove
1:15 p.m. – 2:15 p.m.	General Session: DTCC Asset Services Update Christopher Scotto, Director, DTCC Product Management Joseph Clemente, Manager, DTCC Product Management	Harbor A & B
2:15 p.m. – 2:30 p.m.	General Session: Exhibitor Presentation – Broadridge	Harbor A & B
2:30 p.m. – 3:00 p.m.	Visit / Refreshments with Exhibitors - BDUG	Harbor Foyer
3:00 p.m. – 4:00 p.m.	General Session: Training Opportunities for Operations Staff – Fran M DeMaris, Executive Vice President and Instructor, Cannon Financial Institute	Harbor A & B
4:00 p.m. – 4:30 p.m.	General Session: DTCC Settlement Update – Chris Nolan, Manager, DTCC Product Management	Harbor A & B
6:00 p.m. – 7:00 p.m.	Cocktails	Gulf Lawn (Cove if inclement weather)
7:00 p.m. – 9:00 p.m.	BDUG Dinner	Gulf Lawn (Cove if inclement weather)

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Tuesday, September 23		
8:00 a.m. - 8:45 a.m.	Breakfast sponsored by BDUG	Cove
8:45 a.m. - 9:45 a.m.	General Session: BDUG Membership Town Hall Charity Olson, Associated Bank, N.A., BDUG Vice Chairman	Harbor A & B
9:45 a.m. - 10:15 a.m.	Visit / Refreshments w/ Exhibitors - BDUG	Harbor Foyer
10:15 a.m. - 11:15 a.m.	General Session: OCC Update – Patricia Dalton, Risk Specialist, OCC	Harbor A & B
11:15 a.m. – 11:30 a.m.	General Session: Exhibitor Presentation– Mergent	Harbor A & B
11:30 a.m. - 12:30 p.m.	General Session: Federal Reserve Update Chris Burke, Vice President, Federal Reserve	Harbor A & B
12:30 p.m. - 1:30 p.m.	Lunch	Cove
1:30 p.m. – 2:30 p.m.	General Session: ETF Re-write – Hank Belusa, Director, DTCC Product Management	Harbor A & B
2:30 p.m. – 2:45 p.m.	General Session: Exhibitor Presentation – Chicago Clearing Corp	Harbor A & B
2:45 p.m. - 3:45 p.m.	Operations Best Practice Group Meeting	Harbor A & B
5:30 p.m. – 6:30 p.m.	Exhibitor Reception & Raffle	Harbor Foyer

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Wednesday, September 24		
8:00 a.m. – 9:30 a.m.	Breakfast with DTCC Management – Join members of DTCC's Global Operations & Client Services Organization for breakfast and small group Q&A sessions	Cove
9:30 a.m. – 10:15 a.m.	General Session: AVOX – Mark Sutera, Director, DTCC Product Management	Harbor A & B
10:15 a.m. – 11:00 a.m.	General Session: Clariant Entity Hub – Mathew Keshav Lewis, Head of Client Engagement, Clariant	Harbor A & B
11:00 a.m. – 11:30 a.m.	Conference Recap, Door Prizes & Adjournment	Harbor A & B