

## MEMORANDUM

**To:** File

**From:** Caroline Crenshaw  
Counsel to Commissioner Robert J. Jackson  
U.S. Securities and Exchange Commission

**Date:** July 24, 2018

**Re:** Discussion with SIFMA

On July 23, 2018, Caroline Crenshaw and Satyam Khanna, counsels to Commissioner Robert J. Jackson, met with: Ira Hammerman, SIFMA; Kevin Carroll, SIFMA; Stephanie Nicolas, Wilmer Hale; Christina Jaramillo, Wilmer Hale; Christopher Gilkerson, Schwab; Margo Topman, Goldman Sachs; Anne Tennant, Morgan Stanley; Dean Pinto, Morgan Stanley; Julie, Glynn, JP Morgan; Jose Guerra, JP Morgan; Nina Shenker, JP Morgan; and David Forman, Fidelity. Among the topics discussed were the Commission's proposed Regulation Best Interest and Form CRS.