

MEMORANDUM

To: File

From: Satyam Khanna
Counsel to Commissioner Robert J. Jackson
U.S. Securities and Exchange Commission

Date: July 25, 2018

Re: Discussion with the Certified Financial Planner Board of Standards

On April 24, 2018, Satyam Khanna, counsel to Commissioner Robert J. Jackson, had a discussion with Maureen Thompson of the Certified Financial Planner Board of Standards. Among the topics discussed were the Commission's proposed Regulation Best Interest and Form CRS.