

## MEMORANDUM

**To:** Public Comment File on proposed Regulation Best Interest (File No. S7-07-18)

**From:** Elizabeth Blase, Counsel to Commissioner Elad L. Roisman

**Re:** Meeting with Primerica (“Primerica”)

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On October 24, 2018, Commissioner Elad L. Roisman and his counsels (Elizabeth Blase and Nicholas Losurdo) met with the following representatives of Primerica:

- Peter W. Schneider, President;
- William A. Kelly, Chief Executive Officer of PFS Investments;
- Karen L. Sukin, Executive Vice President & Deputy General Counsel;
- Greg W. Thomas, Senior Vice President & Associate General Counsel; and
- Brant Imperatore of The Cypress Group.

The participants discussed a number of issues related to the Commission’s proposed Regulation Best Interest and Primerica’s comment letter on the same.