

## MEMORANDUM

**To:** Public Comment File on proposed Regulation Best Interest (File No. S7-07-18) and proposed Form CRS Relationship Summary (File No. S7-08-18)

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

**Re:** Meeting with the Financial Services Institute (“FSI”)

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On March 5, 2019, Commissioner Elad L. Roisman and Elizabeth Blase met with the following representatives of FSI:

- David Bellaire, General Counsel; and
- Katanya Moore, Esq., VP, Federal Regulatory Affairs & Managing Counsel.

The participants discussed a number of issues related to the Commission’s proposed Regulation Best Interest and proposed Form CRS Relationship Summary and FSI’s comment letters on the same.