

## **MEMORANDUM**

**To:** File

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

**Date:** December 21, 2018

**Re:** Discussion with CFA Institute

On October 30<sup>th</sup>, 2018, Commissioner Robert J. Jackson, met with James Allen, Head of Capital Markets Policy for the CFA Institute. Among the topics discussed were the Commission's proposed Regulation Best Interest and Form CRS.