

2001 BDUG Conference Agenda

Sunday, October 21st

6:00 – 7:30 p.m. Opening Reception *Poolside Terrace*
Sponsor: *BDUG*

Monday, October 22nd

8:00 - 8:30 a.m. Continental Breakfast *Calibogue*
Co-sponsors: *Vendor Contributors**

8:30 - 9:00 a.m. BDUG Steering Committee & DTCC Introductions *Danner*

9:00 - 9:45 a.m. Keynote Address *Danner*
Robert McGrail, Managing Director, DTCC

9:45 - 10:00 a.m. Vendor Presentation: Xcitek *Danner*

10:00 - 10:30 a.m. Visit with Vendors

10:30 - 11:15 a.m. T+1 and Its Impact on Custodian Banks *Danner*
Thomas McCarthy, Managing Director, DTCC
Jeff Potter, Second Vice President, Northern Trust Company

11:15 - 12:00 p.m. The Role of Omgeo in Straight Through Processing *Danner*
Lee Cutrone, Managing Director, Omgeo

12:00 - 12:15 p.m. Vendor Presentation: SunGard Asset Management Systems *Danner*

12:15 - 1:45 p.m. Lunch with Vendors *Calibogue*
Co-sponsors: *Vendor Contributors**

2:00 - 3:00 p.m. Breakout sessions

- Omgeo Day-to-Day Processing *Elliot*
Jose Manso, Director, Omgeo
- Dividends Update *Drayton*
Pete Gleeson, Vice President, DTCC
- ACATS for Banks *Heyward*
Joe Arney, Vice President, DTCC
Steve Callan, Associate Director, Bear Stearns Securities Corporation

6:30 – 9:30 p.m. Reception and Dinner *Poolside Terrace*
Sponsor: *BDUG*

9:00 – Midnight Monday Night Football Party *Gazebo Lounge*
Sponsor: *BDUG*

Tuesday, October 23rd

8:00 - 8:30 a.m. Continental Breakfast *Calibogue*
Sponsor: *Vendor Contributors**

8:30 - 9:15 a.m. Progress Overseas: An International Update *Danner*
Anthony DiMurro, Vice President, DTCC

9:15 - 9:30 a.m. Vendor Presentation: Optinfo, Inc. *Danner*

9:30 - 10:30 a.m. Breakout sessions

- Omgeo Day-to-Day Processing *Eliot*
Jose Manso, Director, Omgeo
- Reorganization Update *Drayton*

- *Jay Gottlieb, Director, DTCC*
Communication Platform Changes
Cliff Testa, Director, DTCC

Heyward

10:30 - 11:00 a.m. Visit with vendors

11:00 - 12:00 p.m. The Road to Dematerialization
George Kelly, Vice President, DTCC

Danner

12:00 - 1:30 p.m. Lunch and Speaker: "Leadership in a World That's Moving Three Times as Fast"
Anne J. Doss, Executive Vice President, Wachovia Bank, N.A.
Co-sponsors: *Vendor Contributors**

Calibogue

1:30 - 2:00 p.m. Visit with vendors

2:00 - 3:00 p.m. DTCC: An Internet Company
Frances Lapinski, Senior Product Manager, DTCC

Danner

Wednesday, October 24th

8:00 - 8:45 a.m. Buffet Breakfast
Co-Sponsors: *Vendor Contributors**

Jasmine

9:00 - 10:00 a.m. Breakout Sessions

- Dividends Update
Pete Gleeson, Vice President, DTCC

Elliot

- Reorganization Update
Jay Gottlieb, Director, DTCC

Drayton

- T+1 Peer Group Discussion
Jeff Potter, Second Vice President, Northern Trust Company

Heyward

10:00 - 10:30 a.m. Visit with vendors

10:30 - 11:15 p.m. Conference Recap/Q & A

Danner

11:15 - 12:00 p.m. Door prizes & adjournment

Danner

***Vendor Contributors include Checkfree, FT Interactive Data, Omgeo, Optinfo, Inc., SEI Corporation, SunGard Asset Management Systems, Union Bank of California, Vanguard and Xcitek.**