

## Preliminary 2002 BDUG Annual Meeting Agenda

### Monday, October 7th

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| 8:00 – 8:30 AM   | Continental Breakfast  |
| 8:30 – 9:00 AM   | General Session: BDUG Steering Committee & DTCC Introductions  |
| 9:00 – 9:45 AM   | Keynote Address: Dennis Dirks, COO DTCC, President DTC   |
| 9:45 – 10:00 AM  | Vendor Presentation  |
| 10:00 – 10:30 AM | Visit with Vendors   |
| 10:30 – 11:15 AM | General Session: Panel Discussion on STP to include DTCC, Omgeo and a Banker (possibly Jeff Potter, Northern Trust) Walt Palmer to moderate.   |
| 11:15 – 11:30 AM | Vendor Presentation  |
| 11:30 – 12:30 PM | Breakout Sessions: <ul style="list-style-type: none"><li>A) ACATS for Banks with a Focus on Mutual Funds</li><li>B) Omgeo Day to Day Processing</li><li>C) Improving Customer Satisfaction with PINS, the Business Help Desk and the Customer Support Center</li></ul> |
| 12:30 – 2:00 PM  | Lunch (with local speaker) – Mary  |
| 2:00 – 2:30 PM   | Visit with Vendors   |
| 2:30 – 3:30 PM   | General Session: Participant Browser Service   |

### Tuesday, October 8<sup>th</sup>

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| 8:00 – 8:30 Am   | Continental Breakfast   |
| 8:30 – 9:15 AM   | General Session: Contingency Planning, Audit, OCC/SEC, SunGard Speaker – Mary   |
| 9:15 – 9:30 AM   | Vendor Presentation   |
| 9:30 – 10:30 AM  | Breakout Sessions: <ul style="list-style-type: none"><li>D) Improving Customer Satisfaction with PINS, the Business Help Desk and the Customer Support Center</li><li>E) DTC Bill Review</li><li>F) Omgeo Day to Day Processing</li></ul> |
| 10:30 – 11:00 AM | Visit with Vendors  |
| 11:00 – 11:45 AM | General Session: Settlement Update  |
| 11:45 – 12:00 PM | Vendor Presentation   |
| 12:00 – 1:30 PM  | Lunch (with speaker?)   |
| 1:30 – 2:00 PM   | Visit with Vendors  |
| 2:00 – 2:45 PM   | General Session: Corporate Actions and GCAH   |
| 2:45 – 3:00 PM   | Vendor Presentation   |

### Wednesday, October 9<sup>th</sup>

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| 8:00 – 8:45 AM   | Buffet Breakfast   |
| 9:00 – 10:00 AM  | Breakout Sessions: <ul style="list-style-type: none"><li>G) Custody/Dematerialization</li><li>G) DTC Bill Review</li></ul> |
| 10:00 – 10:30 AM | Visit with Vendors   |
| 10:30 – 11:30 AM | General Session: STP Peer Group Discussion   |
| 11:30 – 12:00 PM | Conference Recap, Door Prizes and Adjournment  |

