

## MEMORANDUM

*February 16, 2023*

**TO:** File No. S7-04-23

**FROM:** Jacob D. Krawitz  
Policy Counsel, Office of the Chair

**RE:** Meeting with Fidelity

On February 16, 2023, the Jacob Krawitz of the Chair's Office met with the following representatives of Fidelity

Fidelity Representatives:

- Kristy Croushore
- Terrence Dempsey
- Cynthia Lo Bessette

The participants discussed the Commission's proposal relating to safeguarding advisory client assets.