



2013 Year-end Client Event Briefing

Meeting Hosts:

- Frank Porcelli and Marty Beaulieu
- Keynote Speaker – Rob Kapito

Date, Time and Location:

- Thursday, December 12, 2013
- 6:00 – 10:00 PM
- National Museum of the American Indian in New York City

Target Audience:

- 150 senior decision makers at platinum client firms, including heads of due diligence, platform, field distribution and C-suite management (CEOs, CIOs, etc.).
- 50 BlackRock employees/hosts
- Clients include:
 - Wirehouses (ML, MS, UBS, WF)
 - Large independent firms (AMP, LPL, RJ, EdJ, Met, CW)
 - RIA custodians (Schwab, Fidelity, TDA)
 - Private bank (PNC, JPM, GS, Citi, CS, DB)
 - Institutional Americas (Gamba)
 - iShares Capital Markets (Cavatoni)
 - RIA aggregators (Hightower, Focus, Dynasty)
 - Largest regional firms (RBC, Baird, Janney, Stifel)
 - Partners (Morningstar)

The Client Experience:

- This event is an opportunity to thank our top clients for their partnership and set the stage for 2014.
- Our goal is to further deepen relationships with senior leaders and key decision makers.
- The venue is grand, but will be intimately set to foster networking between our clients.
- Clients will have the opportunity to tour the museum, exploring the diversity of the Native people of the Americas. To complement the still exhibits we will feature spirited entertainment, to include possible Broadway performances with music and dance as well as a graphic artist to capture our clients' experiences for the evening.
- Clients will also receive a premium gift as a token of BlackRock's appreciation.

Theme:

- *A Toast to Partnership* – Looking Forward to 2014

Communications Strategy:

- We will work with each of your businesses to develop a robust list of senior partners.
- Save the date will be sent later this month.
- Formal invitation will be delivered in early November.

Visual Identity and Decor:

- We will actively promote both the BlackRock and iShares brands.
- The museum architecture provides a stunning setting which we will enhance with the right amount of lighting, staging and branding.

Budget

- \$120,000 (\$60K USWA and iShares)
- Additional funding may be required for event entertainment