

**Meeting Among Staff of the Federal Deposit Insurance Corporation and Representatives of
Envestnet Yodlee and Allon Advocacy, LLC**

January 13, 2023

Participants:

Justin Bedore, Luke Brown, Thomas Fox, David Friedman, Judy Gross, Jennifer Jones, Thomas Lyons, Jonathan Miller, Rae-Ann Miller, Sumaya Muraywid, Carlos Pastrana, Marguerite Sagatelian, Deborah Shaw (Federal Deposit Insurance Corporation)

Lisa Novier, Head of Governance, Risk & Compliance - Data Analytics, Envestnet Yodlee (Envestnet)

Steve Boms, President, Allon Advocacy, LLC (Allon Advocacy)

Summary:

Staff of the Federal Deposit Insurance Corporation (FDIC) met with representatives of Allon Advocacy and Envestnet regarding the Proposed Interagency Guidance on Third-Party Relationships: Risk Management (FDIC ZRIN 3064-ZA26) (the “Proposed Guidance”), which was published in the *Federal Register* on July 19, 2021 (86 Fed. Reg. 38182).

Consistent with Envestnet’s comment letter to the FDIC regarding the Proposed Guidance, representatives from Envestnet and Allon Advocacy generally discussed their views on the interplay between the Proposed Guidance and the Consumer Financial Protection Bureau’s (CFPB) forthcoming Section 1033 rulemaking.