

MEMO# 22334

March 14, 2008

Draft ICI Letter to DOL About Quarterly Benefit Statements -- Comments Requested by March 21

URGENT/ACTION REQUESTED

[22334]

March 14, 2008

TO: PENSION COMMITTEE No. 10-08

PENSION OPERATIONS ADVISORY COMMITTEE No. 10-08 RE: DRAFT ICI LETTER TO DOL
ABOUT QUARTERLY BENEFIT STATEMENTS -- COMMENTS REQUESTED BY MARCH 21

As we discussed during our member call on February 6, the Department plans to issue a proposed regulation on periodic benefit statements this spring, and the regulation may or may not retain the positions DOL took in its interim guidance — Field Assistance Bulletins 2006-03 and 2007-03. [1] As a result of our call, we drafted the attached letter urging the Department to retain the interim guidelines in FAB 2006-03 with respect to furnishing statements through multiple documents and electronic delivery. Please let me know if you have any comments on the attached letter by March 21, 2008 (adriggs@ici.org or (202) 218-3573).

Anna Driggs
Assistant Counsel

[Attachment](#)

endnotes

[\[1\]](#) See Memorandums to Pension Members No. 75-06 [20718], dated December 21, 2006, and No. 58-07 [21836], dated October 15, 2007.

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