

MEMO# 23101

December 11, 2008

February 24 And 25 Tax Committee Meetings In Washington, DC

[23101]

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TO: TAX COMMITTEE No. 37-08 RE: FEBRUARY 24 AND 25 TAX COMMITTEE MEETINGS IN WASHINGTON, DC

The next meetings of the Tax Committee will be held on Tuesday, February 24, and Wednesday, February 25, rather than earlier in the month, as we previously planned. The meetings on Tuesday will begin at 10:00 a.m.; the meeting on Wednesday will begin at 9:30 a.m. Lunch will be served at 1:00 p.m. on Tuesday and at the conclusion of the meeting on Wednesday. All meetings will be held in the David Silver Conference Room, on the 12th floor of the Institute's offices at 1401 H Street, NW, Washington, DC 20005.

The Tuesday morning session will be a joint meeting of the Tax, Broker Dealer Advisory, and Transfer Agent Advisory Committees to discuss cost basis reporting implementation (including regulatory guidance that the industry will need and operational considerations that must be addressed). The Tuesday afternoon session, which will begin at 2:00 p.m., will be devoted to one or two specific issues (to be announced) for which in-depth discussion and analysis is needed. During the Wednesday morning session, we will discuss all issues of interest to the Tax Committee, including the ICI's tax agenda and recent regulatory developments. A separate request for agenda suggestions will be made in advance of the meetings.

Online Registration

We are pleased to inform you that we are now offering online registration using Cvent for ICI committee meetings and dinners. In addition, committee members electing to attend the committee dinner will pay a standard amount via credit card as part of the registration

process. To register for the Tax Committee meetings and dinner, please visit our registration site at <http://members.ici.org/reg/tax>. If you have any questions about registration, please contact Ezella Wynn at 202/218-3560 or ewynn@ici.org.

Committee Dinner

As in the past, arrangements are being made for the Tax Committee dinner on Tuesday, February 24. We plan to start dinner at approximately 6:00 p.m. at a nearby restaurant. If you plan to attend the dinner, you must register at our registration site; the cost of the dinner will be \$85.00. Full refunds of the \$85.00 will be made to anyone canceling a dinner reservation by 3:00 p.m. (Eastern) on Thursday, February 19. Refunds will not be provided for dinner reservations cancelled thereafter.

If you have any questions or comments regarding the upcoming meetings, please contact Keith Lawson (at 202/326-5832 or lawson@ici.org), Lisa Robinson (at 202/326-5835 or lrobinson@ici.org), or Karen Lau Gibian (at 202/371-5432 or kgibian@ici.org).

Gwen Shaneyfelt
Tax Committee Chair

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