

MEMO# 30299

October 11, 2016

October 25 and 26 Tax Committee Meeting Agendas

[30299]

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TO: TAX COMMITTEE No. 29-16 RE: OCTOBER 25 AND 26 TAX COMMITTEE MEETING AGENDAS

As we previously informed you, the next meetings of the Tax Committee will be held on Tuesday, October 25, and Wednesday, October 26, 2016.^[1] If you plan to attend the meetings and have not registered already, please do so at your first convenience at: www.ici.org/reg/tax. If you have any questions about registration, please contact Ezella Wynn at 202/218-3560 or ewynn@ici.org.

The Tuesday, October 25 meeting will begin at 2:00 p.m.; the Wednesday meeting will begin at 9:30 a.m. and will conclude at approximately 2:00 p.m. Lunch will be served at 12:30 p.m. on Tuesday and during the meeting on Wednesday. Breakfast will be served prior to the meeting Wednesday morning. 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.

Meeting Topics/Agenda

On Tuesday, we will discuss RIC Modernization Act Technical Corrections, the ISDA 871(m) protocol, and the recent IRS guidance on commodities funds. On Wednesday, Barbara Angus, Chief Tax Counsel at the Committee on Ways and Means, will join us to discuss tax reform. Following her remarks, we will discuss other issues of interest to the industry.

Committee Dinner

The Tax Committee dinner will be held on Tuesday, October 25 at The Hamilton (600 14th Street, NW Washington, DC 20005). Dinner will start at approximately 6:00 p.m. If you plan to attend the dinner, you must register at our registration site; the cost of the dinner will be \$105.00. Full refunds of the \$105.00 will be made to anyone canceling a dinner reservation by 3:00 p.m. (Eastern) on Thursday, October 20. Refunds will not be provided for dinner reservations cancelled thereafter.

Building Security

Please note that due to enhanced building security procedures, meeting attendees will

need to check in at the lobby security desk.

Continuing Professional Education (CPE) Credit

Meeting attendees are eligible for approximately 7.00 hours of CPE credit (Taxation). The Investment Company Institute is registered with the National Association of State Boards of Accountancy (“NASBA”) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to NASBA, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417, www.nasba.org.

For more information regarding administrative policies such as complaint and refund, please contact the ICI’s office at 202/326-5968.

- Learning Objectives: To provide updates on current legislative and regulatory developments affecting mutual funds and investment advisors.
- Program Level: Update.
- Delivery Mode: Group Live Course.
- No prerequisites or advance preparations are necessary for these meetings.

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

Jon Davis
Tax Committee Chair

[Attachment](#)

endnotes

[1] See Institute [Memorandum](#) (30243) to Tax Committee No. 27-16, dated September 15, 2016.

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