

MEMO# 30876

September 19, 2017

Joint Pension and Pension Operations Advisory Committee Meeting, Tuesday, October 17 -- Save the Date

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September 19, 2017 TO: Pension Committee

Pension Operations Advisory Committee RE: Joint Pension and Pension Operations Advisory Committee Meeting, Tuesday, October 17 -- Save the Date

The next joint meeting of the Pension and Pension Operations Advisory Committees will take place on Tuesday, October 17, 2017, beginning at 10:00 a.m. Eastern time. The meeting will be held in the David Silver Conference Room at the Institute's office located at 1401 H Street NW, 12th Floor, Washington, DC. Lunch will be served.

Online Meeting and Dinner Registration

To register for the October meeting, please visit our registration site at www.ici.org/reg/pension. Please note that the only way to register for the meeting and dinner (described below) is through the link indicated above. If you have any questions about registration, please contact Brenda Turner at 202/326-5820 or bturner@ici.org.

Agenda/Speakers

Michael Kreps and Brigen Winters, Principals at Groom Law Group, will speak on the possibility for tax reform and, in particular, prospects for the retirement saving incentives to be impacted. We also intend to invite a speaker to discuss the fiduciary rulemaking and timing considerations associated with potential changes to the rule and related exemptions. The Retirement Policy team is in the process of putting together an agenda; if you have any suggestions for agenda items, please email them to Elena Chism (elena.chism@ici.org).

Building Security

Please note that due to enhanced building security procedures, meeting attendees will need to check in at the lobby security desk.

October 16 Dinner

We are organizing an informal dinner for the evening of Monday, October 16 at 6:00 p.m. for Committee members (or their substitutes) and ICI staff at a nearby restaurant; details will follow. The cost of the dinner is \$105.00 per person and can be paid via credit card as part of the registration process. Please note that dinner cancellations must be made by

5:00 p.m. Eastern on Thursday, October 12 in order to receive a refund.

Jason Bortz
Chairperson - Pension Committee

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