May 16, 2013

# Joint Pension and Pension Operations Advisory Committee Meeting, Tuesday, June 4, 2013; Preliminary Agenda Attached

[27239]

May 16, 2013

TO: PENSION COMMITTEE No. 11-13
PENSION OPERATIONS ADVISORY COMMITTEE No. 11-13 RE: JOINT PENSION AND PENSION OPERATIONS ADVISORY COMMITTEE MEETING, TUESDAY, JUNE 4, 2013; PRELIMINARY AGENDA ATTACHED

The joint meeting of the Pension and Pension Operations Advisory Committees will take place on Tuesday, June 4, 2013, beginning at 10:00 a.m. Eastern time, in the David Silver Conference Room at the Institute's offices located at 1401 H Street, N.W., 12th Floor, Washington, DC. Lunch will be served.

Our guest speakers for this meeting are --

Ann Cammack, Tax Counsel, Senate Committee on Finance (confirmed)

Mark Iwry, Senior Advisor to the Secretary of the Treasury & Deputy Assistant Secretary for Retirement and Health Policy, U.S. Department of the Treasury (confirmed)

Jeff Monhart, Division of Field Operations, Office of Enforcement, U.S. Department of Labor, Employee Benefits Security Administration (invited)

Jon Breyfogle, Groom Law Group (confirmed)

A preliminary meeting agenda is attached. The focus of the Compliance Corner presentation will be on common mistakes in compliance with the DOL class exemptions for mutual funds. If you have issues you would like added to the agenda, please email them to Anna Driggs (adriggs@ici.org).

We are organizing a dinner for the evening of Monday, June 3 at 6:30 p.m. for members and ICI staff who would like to get together informally. Further details will be sent to those

interested in attending the dinner.

If you plan to attend the meeting and/or the dinner, please send an email to Brenda Turner at [bturner@ici.org](mailto:bturner@ici.org).


Douglas O. Kant
Chairperson, Pension Committee

[Attachment](#)

---