

**MEMO# 28997**

May 20, 2015

## **Agendas for June 16 and 17 Tax Committee Meetings in Baltimore**

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TO: TAX COMMITTEE No. 22-15 RE: AGENDAS FOR JUNE 16 AND 17 TAX COMMITTEE MEETINGS IN BALTIMORE

The next regularly-scheduled meetings of the Tax Committee, as we informed you previously, will be held on June 16 and 17 in Baltimore, Maryland at the Four Seasons Hotel. The Tuesday, June 16 meeting will begin at 2:00 p.m. and will be preceded by lunch. The Wednesday, June 17 meeting will begin at 9:30 a.m. and will be preceded by breakfast. Lunch will be served at the conclusion of the meeting on Wednesday.

The meeting on June 16 will address various financial products tax issues with a focus on those for which additional guidance would be welcome. Experts from PwC will help lead the discussion of these issues. Please feel free to send your suggestions for issues to be covered during the financial products session to Karen Gibian (202/371-5432 or [kgibian@ici.org](mailto:kgibian@ici.org)), Ryan Lovin (202/326-5826 [ryan.lovin@ici.org](mailto:ryan.lovin@ici.org)), or Keith Lawson (202/326-5832 or [lawson@ici.org](mailto:lawson@ici.org)).

The meeting on June 17 will address the Committee's entire policy agenda. A draft agenda for this meeting is attached. Please feel free, once again, to send your suggestions for additional agenda items to Karen, Ryan, or Keith.

### **Online Registration/Committee Dinner**

You may register online for the Tax Committee meetings, as well as for either dinner or the baseball game (on Tuesday, June 16), through Cvent at [www.ici.org/reg/tax](http://www.ici.org/reg/tax). Tickets for the suites reserved for the baseball game will be distributed on a "first-come/first-served" basis. Committee members electing to attend the committee dinner will pay a standard amount via credit card as part of the registration process. If you have any further questions about registration, please contact Ezella Wynn at 202/218-3560 or [ewynn@ici.org](mailto:ewynn@ici.org).

### **Hotel Reservations**

Please note that the cutoff date for the room block at the Four Seasons Hotel (200 International Drive, Baltimore, MD) is this Friday: May 22. Please make your reservations by calling 410-576-5800 or going online at: <http://www.fourseasons.com/baltimore/>. The

corporate/promo code is IN0615TR. The rate is \$299 per night plus tax. Please identify yourself as a member of Investment Company Institute or use the code above.

If you would like to book outside of the contracted dates (of June 15 and 16), please contact the hotel directly and speak to a reservation agent.

### **Continuing Professional Education (CPE) Credit**

Meeting attendees are eligible for approximately 7.5 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](http://www.nasba.org).

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- 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.

Greg Hinkle  
Tax Committee Chair

[Attachment](#)

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