

MEMO# 27910

February 24, 2014

Agendas for Research Committee Meeting on April 3, 2014 and ICI Retirement Summit on April 4, 2014

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TO: RESEARCH COMMITTEE No. 3-14

PENSION COMMITTEE No. 3-14 RE: AGENDAS FOR RESEARCH COMMITTEE MEETING ON APRIL 3, 2014 AND ICI RETIREMENT SUMMIT ON APRIL 4, 2014

ICI RESEARCH COMMITTEE MEETING - April 3, 2014

The Research Committee will next meet on Thursday, April 3, 2014 at the Mayflower Renaissance Washington, DC Hotel: 1127 Connecticut Avenue, NW, Washington, DC. The meeting will be held from 1:00 pm through 5:00 pm (ET). (Lunch will NOT be served.)

The April 3, 2014 Research Committee meeting will be devoted to retirement research of member firms and the ICI. The sessions will provide members with an opportunity to share and discuss retirement-related research and its implications for plan design and public policy. In addition, BrightScope will present benchmarking results from their proprietary database that contains detailed information on 401(k) plans from audited DOL filings. Attachment A contains the agenda for the Research Committee meeting.

In conjunction with this meeting, members of the Research Committee also are invited to attend the ICI Retirement Summit: A Close Look at Retirement Preparedness in America that ICI is hosting on Friday, April 4, 2014 from 8:45 am through 4:45 pm (ET) at the National Press Club located at 529 14th Street, NW, Washington, DC (with light breakfast starting at 8:00 am). The ICI is convening this conference to bring leading academic researchers together to discuss the state of the U.S. retirement system. Attachment B contains an updated agenda for the summit.

Please note, that the Research Committee meeting (April 3, 2014) and ICI Retirement Summit (April 4, 2014) are two separate events and that you will need to register for them separately.

In addition, on Thursday evening, April 3, we will hold a dinner with a guest speaker at Charlie Palmer (101 Constitution Avenue, NW, Washington, DC) for Retirement Summit

attendees and speakers. The cost of the dinner is \$75.00 per person.

A. ICI Research Committee Meeting Registration

The registration link for the April 3, 2014 meeting is www.ici.org/reg/research. The meeting will be 1:00 pm to 5:00 pm at the Mayflower Renaissance hotel. You also will be prompted to register for the dinner at Charlie Palmer on the evening of April 3. Your confirmation e-mail will include a link that will allow you to make a hotel reservation at the Mayflower Renaissance.

B. ICI Retirement Summit Registration

The registration link for the April 4, 2014 Retirement Summit is www.ici.org/reg/retirement/summit. The Retirement Summit will be 8:45 am to 4:45 pm at the National Press Club. Please note, this invitation is transferable. The confirmation e-mail will include a link that will allow you to make a hotel reservation at the Mayflower Renaissance.

C. Hotel

ICI has reserved a limited block of rooms for this meeting and the Retirement Summit at the Mayflower Renaissance Washington, DC Hotel (1127 Connecticut Avenue, NW, Washington, DC). After registering for either the Research Committee or the Retirement Summit, your confirmation e-mail will include a link that will allow you to make a hotel reservation at the Mayflower Renaissance.

- Registrants may make reservations at the Mayflower Renaissance hotel at the special conference rate of \$289 single/double plus taxes, based on availability.
- All reservations, cancellations, and modifications to existing reservations must be done online in order to receive the conference rate. A credit card is required to guarantee your reservation. The Mayflower Renaissance hotel will NOT accept reservations over the telephone for hotel rooms at the special conference rates.
- Hotel rooms at the special conference rate are for the exclusive use of meeting/summit attendees. You must be registered for the meeting/summit in order to receive this room rate.
- Once you have made your hotel reservations online, a confirmation number will be sent to you. Please keep this confirmation number for your records. You will need it in order to modify or cancel your existing reservation.
- Reservations must be made by Monday, March 10, 2014 to receive the special conference rate.

Other hotels in the area include the Hamilton Crowne Plaza (14th and K Street, NW) at 800/263-9802, the J.W. Marriott (14th and Pennsylvania Avenue, NW) at 800/393-2503, and the Capital Hilton (16th and K Street, NW) at 800/445-8667. Please call the hotel directly to make your reservations.

If you have any logistical questions before then, please contact Maria Castellon at 202-326-5868.

We look forward to seeing you in April.

Gary Blank
VP, Public Policy Development

Fidelity Investments
Chairman, Research Committee Sarah Holden
Senior Director, Retirement & Investor
Research

[Attachment - Research Committee Agenda](#)

[Attachment - ICI Retirement Summit Agenda](#)

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