

MEMO# 21611

September 18, 2007

Revised Draft Model Information Sharing Agreement for 403(b) Plans; Conference Call Scheduled for Friday, September 21

[21611]

September 18, 2007

TO: PENSION COMMITTEE No. 27-07

PENSION OPERATIONS ADVISORY COMMITTEE No. 28-07 RE: REVISED DRAFT MODEL INFORMATION SHARING AGREEMENT FOR 403(b) PLANS; CONFERENCE CALL SCHEDULED FOR FRIDAY, SEPTEMBER 21

Attached for your review is a revised draft ICI model agreement for use in satisfying the requirements for information sharing between sponsors of 403(b) plans and service providers. [1] We received numerous comments on the first draft and have scheduled a conference call to discuss the second draft. The call is scheduled for Friday, September 21, 2007 at 2:00 p.m. Eastern Time.

If you would like to participate in the call, please complete the attached response form and fax or e-mail it to Brenda Turner at 202/326-5841 or bturner@ici.org by noon on Friday, September 21. To participate, please dial 888-603-9739 and enter passcode 36777. As a reminder, because all lines are open to facilitate discussion, please remember to place your line on mute when not speaking and do not place the call on hold.

Elena Barone
Assistant Counsel

[Attachment](#)

endnotes

[1] See [Memorandum](#) to Pension Committee No. 25-07 and Pension Operations Advisory Committee No. 26-07 [21536], dated August 28, 2007.

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