

MEMO# 32889

November 3, 2020

Registration: ICI Research Committee Video Meeting: December 15, 2020, 11:00 AM (ET) to 2:00 PM (ET)

[32889]

November 3, 2020 TO: Research Committee RE: Registration: ICI Research Committee
Video Meeting: December 15, 2020, 11:00 AM (ET) to 2:00 PM (ET)

The ICI Research Committee will be having a video meeting on December 15, 2020 to update committee members on recent policy developments impacting fund and retirement markets, as well as recent research. The meeting will also feature a panel discussion around the understanding and use of ESG criteria in investing.

In addition, please save the dates for these upcoming ICI Research Committee Video Meetings:

March 16, 2021: 11:00 AM (ET) to 2:00 PM (ET) June 15, 2021: 11:00 AM (ET) to 2:00 PM (ET)

A preliminary agenda for the December 15, 2020 meeting and registration information is provided below.

Preliminary Agenda for December 15, 2020

11:00 AM – Welcome Remarks and Antitrust Reminder

- Paul Schaeffer, IndexIQ, and Sarah Holden, ICI

11:05 AM to noon – The Evolving Understanding and Use of ESG Criteria in Investing

- Panel of speakers to be invited

Noon to 12:30 PM – Lunch/Break on your own

12:30 PM to 12:55 PM – ICI Research Update

- ICI Chief Economist, Sean Collins, will update the committee on recent developments in the fund market.
- ICI Research staff will highlight recent research publications.

12:55 PM to 1:50 PM – Washington Update on Retirement and Fund Policy

- ICI Government Affairs staff will update the committee on recent developments with policymakers.
- ICI Law staff will update the committee on recent developments in regulatory circles.

1:50 PM to 2:00 PM – Discussion of Topics for Future Calls/Meetings

2:00 PM – Adjourn

Registration

The registration link for the December 15, 2020 meeting is <https://cvent.me/GVmMPa>. If you have any logistical questions before then, please contact Maria Castellon.

We hope you can join us.

Paul Schaeffer
Chairman, Research Committee
IndexIQ

Sarah Holden
Senior Director, Retirement & Investor Research

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