

**MEMO# 22024**

December 6, 2007

## **Conference Call on December 18 at 3:00 PM ET to Discuss IRS Proposed Automatic Enrollment Regulations**

[22024]

December 6, 2007

TO: PENSION COMMITTEE No. 39-07

PENSION OPERATIONS ADVISORY COMMITTEE No. 40-07 RE: CONFERENCE CALL ON  
DECEMBER 18 AT 3:00 PM ET TO DISCUSS IRS PROPOSED AUTOMATIC ENROLLMENT  
REGULATIONS

The Institute will hold a conference call on Tuesday, December 18, at 3:00 PM Eastern Time to discuss the proposed Treasury and IRS automatic enrollment regulations. The purpose of the call is to identify issues on which the Institute should comment.

The proposed regulations cover the new “qualified automatic contribution arrangement” safe harbor in Internal Revenue Code (IRC) §§ 401(k)(13) and 401(m)(12); permissible withdrawals under an “eligible automatic contribution arrangement” under IRC § 414(w); and revisions to the rules governing return of excess contributions and excess aggregate contributions under IRC § 4979. [\[1\]](#) Comments on the proposed regulations are due February 6, 2008.

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](mailto:bturner@ici.org) by noon on Tuesday, December 18. To participate, please dial 1-888-458-9977 and enter passcode 46302. 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.

Michael L. Hadley  
Associate Counsel

[Attachment](#)

**endnotes**

[1] See [Memorandum](#) to Pension Members No. 65-07 [21941], dated November 9, 2007.

---

Copyright © by the Investment Company Institute. All rights reserved. Information may be abridged and therefore incomplete. Communications from the Institute do not constitute, and should not be considered a substitute for, legal advice.