

**MEMO# 29712**

February 18, 2016

## **March 3-4 2016 Tax Committee Meeting - Additional Details and Agenda**

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TO: TAX COMMITTEE No. 4-16 RE: MARCH 3-4 2016 TAX COMMITTEE MEETING -  
ADDITIONAL DETAILS AND AGENDA

As we previously informed you, [\[1\]](#) the next meeting of the ICI Tax Committee will be held on Thursday, March 3 and Friday, March 4 in Scottsdale, Arizona. Vanguard will be hosting the meetings at its offices (located at 15111 N. Pima Road). If you plan to attend the meetings and have not registered already, please do so at your earliest convenience by using the attached link: [www.ici.org/reg/tax](http://www.ici.org/reg/tax). If you have any questions please contact Ezella Wynn at 202/218-3560 or [ewynn@ici.org](mailto:ewynn@ici.org).

The meeting on Thursday, March 3 will begin at 2:00 p.m. The meeting on Friday, March 4 will begin at 9:00 a.m. Lunch will be served both days; breakfast will be available on Friday.

### **Meeting Topics/Agenda**

The meeting on Thursday, March 3, will be led by representatives from KPMG and will focus on financial products issues. The March 4th meeting will focus on all tax issues of interest to the industry. Preliminary agendas for both meetings are attached.

### **Transportation**

We have arranged for buses to transport members from the meeting on Thursday back to the ICI hotel and to and from dinner. We also will provide transportation from the ICI hotel to the meeting on Friday.

### **Hotel Information**

We understand that the rooms for our secured hotel are already booked. Below you will find a list of alternatives (listed in order of closest to the ICI hotel).

- Courtyard Scottsdale North

17010 N. Scottsdale Rd.  
Scottsdale, AZ 85255  
480-922-8400

<http://www.marriott.com/hotels/travel/phxcn-courtyard-scottsdale-north/>

- Residence Inn  
17011 N. Scottsdale Road  
Scottsdale, AZ 85255  
480-563-4120  
<http://www.marriott.com/hotels/travel/phxrn-residence-inn-scottsdale-north/>
- Fairmont Scottsdale Princess  
7575 E. Princess Drive  
Scottsdale, AZ 85255  
480-585-4848  
<http://www.fairmont.com/scottsdale/>
- Scottsdale Links Resort  
16858 N. Perimeter Drive  
Scottsdale, AZ 85255  
480-563-0500  
<https://www.diamondresortsandhotels.com/resorts/scottsdale-links-resort>
- Scottsdale Marriott at McDowell Mountains  
16770 N. Perimeter Drive  
Scottsdale, AZ  
480-502-3836  
<http://www.marriott.com/hotels/travel/phxno-scottsdale-marriott-at-mcdowell-mountains/>
- Epix Hotel & Resorts  
Indoor Lodging  
13825 N Northsight Blvd #201  
Scottsdale, AZ 85260  
480-948-4755
- Holiday Inn  
14255 N 87th Street  
Scottsdale, AZ 85260  
480-922-6500  
<http://www.ihg.com/holidayinn/hotels/us/en/scottsdale/phxsa/hoteldetail>

## Committee Dinner

The Tax Committee dinner will be held on Thursday, March 3, at The Brat House (3622 N. Scottsdale Rd., Scottsdale, AZ). We plan to start dinner at approximately 6:00 p.m. The ICI will provide transportation to and from dinner. If you plan to attend the dinner, you must register at our registration site; the cost of the dinner will be \$105.00. Full refunds of the \$105.00 will be made to anyone canceling a dinner reservation by 3:00 p.m. (Eastern) on Monday, February 29. Refunds will not be provided for dinner reservations cancelled thereafter.

# Continuing Professional Education (CPE) Credit

Meeting attendees are eligible for approximately 7.00 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).

For more information regarding administrative policies such as complaint and refund, please contact the ICI's office at 202/326-5968.

- 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.

If you have any questions or comments regarding the upcoming meetings, please contact Keith Lawson (at 202/326-5832 or [lawson@ici.org](mailto:lawson@ici.org)), Karen Gibian (at 202/371-5432 or [kgibian@ici.org](mailto:kgibian@ici.org)) or Ryan Lovin (at 202/326-5826 or [ryan.lovin@ici.org](mailto:ryan.lovin@ici.org)).

Greg Hinkle  
Tax Committee Chair

[Attachment](#)

## endnotes

[1] See Institute [Memorandum](#) (29658) dated February 4, 2016

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