

MEMO# 28973

May 12, 2015

June 16 and 17, 2015 Tax Committee Meetings in Baltimore, MD

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TO: TAX COMMITTEE No. 20-15 RE: JUNE 16 AND 17, 2015 TAX COMMITTEE MEETINGS IN BALTIMORE, MD

The next regularly-scheduled meetings of the Tax Committee will be held on June 16 and June 17, 2015, in Baltimore, Maryland at the Four Seasons Hotel. The Tuesday, June 16 meeting will begin at 2:00 p.m. and will be preceded by lunch. The Wednesday, June 17 meeting will begin at 9:30 a.m. and will be preceded by breakfast. Lunch will be served at the conclusion of the meeting on Wednesday. A complete preliminary agenda for both the June 16 and June 17 meetings will be distributed approximately one week prior to the meetings.

Online Registration

You may register for the Tax committee meeting, as well as either dinner or the baseball game (Tuesday, June 16) online through Cvent at www.ici.org/reg/tax. Committee members electing to attend the committee dinner will pay a standard amount via credit card as part of the registration process. If you have any further questions about registration, please contact Ezella Wynn at 202/218-3560 or ewynn@ici.org.

Committee Dinner

As in the past, arrangements are being made for the Tax Committee dinner on Tuesday, June 16, for those members who choose not to attend the baseball game. We plan to start dinner at approximately 6:00 p.m. at a nearby restaurant. If you plan to attend the dinner, you must register at our registration site; the cost of the dinner will be \$98.00. Full refunds of the \$98.00 will be made to anyone canceling a dinner reservation by 3:00 p.m. (Eastern) on Thursday, June 11. Refunds will not be provided for dinner reservations cancelled thereafter.

Hotel Reservations

We have arranged for a room block for Monday, June 15 and Tuesday, June 16 at the Four Seasons Hotel, which is located at 200 International Drive, Baltimore, MD. Please make your reservations by calling 410-576-5800 or you may make reservations online at: <http://www.fourseasons.com/baltimore/>. The corporate/promo code is IN0615TR. The rate is \$299 per night plus tax.

To receive the preferred hotel rate you must reserve your hotel room before the cutoff date of May 22, 2015. Please identify yourself as a member of Investment Company Institute or use the code above.

If you would like to book outside of the contracted dates (to arrive earlier or to stay later) please contact the hotel directly and speak to a reservation agent.

Suggestions for Meeting Topics

Please forward any suggestions that you have for issues to be discussed at these meetings to Keith Lawson (202/326-5832 or lawson@ici.org), Karen Gibian (202/371-5432 or kgibian@ici.org) or Ryan Lovin (202/326-5826 ryan.lovin@ici.org).

Continuing Professional Education (CPE) Credit

Meeting attendees are eligible for approximately 7.5 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.

For more information regarding administrative policies such as complaint and refund, please contact our offices 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.

Greg Hinkle
Tax Committee Chair

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