

**MEMO# 26981**

February 7, 2013

## **Preliminary Agenda for February 20-21 Tax Committee Meetings**

[26981]

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TO: TAX COMMITTEE No. 2-13 RE: PRELIMINARY AGENDA FOR FEBRUARY 20-21 TAX COMMITTEE MEETINGS

As we informed you previously, the next meetings of the Tax Committee will be held on Wednesday, February 20, and Thursday, February 21. [\[1\]](#) If you plan to attend the meetings and have not registered already, please do so at your first convenience by using the attached link: [www.ici.org/reg/tax](http://www.ici.org/reg/tax). If you have any questions about registration, please contact Ezella Wynn at 202/218-3560 or [ewynn@ici.org](mailto:ewynn@ici.org).

Lunch will be served at 1:00 p.m. on Wednesday and at the conclusion of the meeting on Thursday. All meetings will be held in the David Silver Conference Room, on the 12th floor of the Institute's offices at 1401 H Street, NW, Washington, DC 20005.

### **Meeting Topics/Agenda**

The meeting on Wednesday, February 20 will begin at 2:00 p.m. and involve a detailed discussion on (1) The Ways and Means Committee's discussion draft regarding tax reform of financial products and (2) RIC Mod technical corrections. The February 21 meeting will begin at 9:30 a.m. and will focus on all tax issues of interest to the industry. Preliminary agendas for both meetings are attached.

### **Committee Dinner**

The Tax Committee dinner will be held on Wednesday, February 20, at DC Coast (1401 K Street, NW, Washington, DC). We plan to start dinner at approximately 6:00 p.m. If you plan to attend the dinner, you must register at our registration site; the cost of the dinner will be \$85.00. Full refunds of the \$85.00 will be made to anyone canceling a dinner reservation by 3:00 p.m. (Eastern) on Friday, February 15. Refunds will not be provided for dinner reservations cancelled thereafter.

### **Continuing Professional Education (CPE) Credit**

Meeting attendees are eligible for approximately 7.0 hours of CPE credit (Taxation). The

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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.
- DeliveryMode: 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)) or 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](#) (26785) to Tax Committee No. 54-12, dated December 20, 2012.

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