

**MEMO# 31086**

February 14, 2018

## **Preliminary Agendas for February 26 and 27 Tax Committee Meetings**

[31086]

February 14, 2018 TO: Management Company Tax Subcommittee

Tax Committee RE: Preliminary Agendas for February 26 and 27 Tax Committee Meetings

As we informed you previously, the next meetings of the Tax Committee will be held on Monday, February 26, and Tuesday, February 27, 2017.[\[1\]](#)

If you plan to attend the meetings and have not already registered, please do so at your earliest convenience at: [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).

The meeting on Monday will begin at 2:00 p.m.; the meeting on Tuesday will begin at 9:30 a.m. and will conclude at approximately 2:00 p.m. Lunch will be served at 12:30 p.m. on Monday and during the meeting on Tuesday. 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 Monday, February 26, will be led by representatives from Deloitte, EY, KPMG, and PwC, and will focus on issues arising from the recent tax legislation. The February 27th meeting will focus on all tax issues of interest in the industry. Preliminary agendas for both meetings are attached.

### **Committee Dinner**

The Tax Committee dinner will be held on Monday, February 26, at [Woodward Table](#) (1426 H St. NW), at 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 \$115.00. Full refunds of the \$115.00 will be made to anyone canceling a dinner reservation by 3:00 p.m. (Eastern) on Wednesday, February 21. Refunds will not be provided for dinner reservations cancelled thereafter.

### **Building Security**

Please note that due to enhanced building security procedures, meeting attendees will need to check in at the lobby security desk.

## 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 Katie Sunderland (at 202/326-5826 or [katie.sunderland@ici.org](mailto:katie.sunderland@ici.org)).

Jon Davis  
Tax Committee Chair

### [Attachment](#)

#### **endnotes**

[1] See Institute [Memorandum No. 31016](#) to Tax Committee, dated January 11, 2018.

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