

**MEMO# 24574**

October 5, 2010

## **Preliminary Agendas for October 11-12 Tax Committee Meetings**

[24574]

October 5, 2010

TO: TAX COMMITTEE No. 29-10 RE: PRELIMINARY AGENDAS FOR OCTOBER 11-12 TAX COMMITTEE MEETINGS

Next week's Tax Committee meetings, as we informed you previously, [\[1\]](#) will be held at the Hamilton Crowne Plaza Hotel, which is located on the corner of 14th and K Streets (NW). If you plan to attend the meeting and have not registered already, please do so at your first convenience by using the attached link: <http://members.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).

### **Meeting Topics/Agendas**

The meeting on October 11, which will begin at 2:00 p.m., will focus on the international tax compliance initiative known as "FATCA", tax issues arising from the proposed changes to Rule 12b-1, and perhaps one other issue of general interest to the Committee. The preliminary agenda is attached for the October 12 meeting, which will begin at 9:30 a.m., and focus on all tax issues of interest to the industry.

### **Committee Dinner**

The Tax Committee dinner will be held on Monday, October 11th, at The District Chophouse (located at 509 7th Street, NW, Washington, DC). The reception will start at 6:30 p.m. and dinner will begin at approximately 7:00 p.m. If you plan to attend the dinner, you must register at our registration site: <http://members.ici.org/reg/tax>; 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 Wednesday, October 6. Refunds will not be provided for dinner reservations cancelled thereafter.

## Metro (Subway) Travel Advisory

If you are planning to take the Washington metro (subway) during your stay, please be advised that the McPherson Square station (the closest station to the ICI and the Hamilton Crowne Plaza hotel) will not be open from Friday evening, October 8, through Monday, October 11. [2] In addition, during these times, train service on the Blue and Orange Lines will not stop at Metro Center or Farragut West (the stations adjacent to McPherson Square station). The Metro Center station will be open for travel on the Red Line (which services (i) Union Station directly and (ii) Reagan National Airport indirectly, via the Yellow Line, which connects with the Red Line at Gallery Place/Chinatown).

## 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.
- DeliveryMode: Group Live Course.
- No prerequisites or advance preparations are necessary for these meetings.

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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)).

Gwen Shaneyfelt  
Tax Committee Chair

[Attachment \(in .pdf format\)](#)

### endnotes

[1] See Institute [Memorandum](#) (24552) to Tax Committee No. 27-10, dated September 23, 2010.

[2] See, [http://www.wmata.com/rider\\_tools/metro\\_service\\_status/rail\\_Bus.cfm](http://www.wmata.com/rider_tools/metro_service_status/rail_Bus.cfm)

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