

**MEMO# 32224**

February 25, 2020

## **Joint Pension and Pension Operations Advisory Committees Meeting -- Tuesday, April 14, 2020**

[32224]

February 25, 2020 TO: Pension Committee

Pension Operations Advisory Committee RE: Joint Pension and Pension Operations Advisory  
Committees Meeting -- Tuesday, April 14, 2020

The next joint meeting of the ICI Pension and Pension Operations Advisory Committees will take place on Tuesday, April 14, 2020, beginning at 10:00 a.m. Eastern time. The meeting will be held in the David Silver Conference Room at the Institute's office located at 1401 H Street NW, 12th Floor, Washington, DC. Lunch will be served.

### **Online Meeting Registration**

To register for the April meeting, please visit our registration site at [www.ici.org/reg/joint/pension](http://www.ici.org/reg/joint/pension). Please note that the only way to register for the meeting is through the link indicated above. If you have any questions about registration, please contact Brenda Turner at 202/326-5820 or [bturner@ici.org](mailto:bturner@ici.org).

### **Speakers/Agenda**

**Preston Rutledge**, Assistant Secretary of Labor for the Employee Benefits Security Administration, will discuss EBSA's ongoing and anticipated projects. **Dan Kleinman** and **Lindsay Jackson**, partners at Morgan, Lewis & Bockius LLP, will discuss the status of Reg. BI implementation. An additional speaker has been invited to discuss SECURE Act implementation issues.

The draft agenda is attached with links to relevant background material. Also attached are updated charts describing the status of (1) state-level activity relating to standards of conduct for broker-dealers and investment advisors and (2) state-run retirement savings programs for private sector workers. These charts relate to Agenda Items 3.c and 6 respectively.

If you have suggestions for additional agenda items, please email them to Elena Chism ([elena.chism@ici.org](mailto:elena.chism@ici.org)).

## **Building Security**

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

## **Dinner**

We do not plan to have a formal dinner on the evening of April 13, but for anyone interested in getting together informally for dinner with other committee members, please let us know and we can circulate a list.

Jason Bortz  
Chairperson - Pension Committee

[Attachment No. 1](#)

[Attachment No. 2](#)

[Attachment No. 3](#)

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