

**MEMO# 29658**

February 4, 2016

## **March 3-4 2016 Tax Committee Meeting Registration in Scottsdale, Arizona**

[29658]

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TO: TAX COMMITTEE No. 3-16 RE: MARCH 3-4 2016 TAX COMMITTEE MEETING  
REGISTRATION IN SCOTTSDALE, ARIZONA

As we previously informed you, [\[1\]](#) the next meeting of the ICI Tax Committee will be held on Thursday, March 3 and Friday, March 4 in Scottsdale, Arizona. Vanguard will be hosting the meeting at its offices (located at 15111 N. Pima Road).

The meeting on Thursday, March 3 will begin at 2:00 p.m. The meeting on Friday, March 4 will begin at 9:30 a.m. Lunch will be served both days; breakfast will be available on Friday.

### **Hotel Information**

We understand that the rooms for our secured hotel are already booked. Below you will find a list of alternatives (listed in order of closest to the ICI hotel).

- Courtyard Scottsdale North  
17010 N. Scottsdale Rd.  
Scottsdale, AZ 85255  
480-922-8400  
<http://www.marriott.com/hotels/travel/phxcn-courtyard-scottsdale-north/>
- Residence Inn  
17011 N. Scottsdale Road  
Scottsdale, AZ 85255 480-563-4120  
<http://www.marriott.com/hotels/travel/phxrn-residence-inn-scottsdale-north/>
- Fairmont Scottsdale Princess  
7575 E. Princess Drive  
Scottsdale, AZ 85255  
480-585-4848  
<http://www.fairmont.com/scottsdale/>

- Scottsdale Links Resort  
16858 N. Perimeter Drive  
Scottsdale, AZ 85255  
480-563-0500  
<https://www.diamondresortsandhotels.com/resorts/scottsdale-links-resort>
- Scottsdale Marriott at McDowell Mountains  
16770 N. Perimeter Drive  
Scottsdale, AZ  
480-502-3836  
<http://www.marriott.com/hotels/travel/phxno-scottsdale-marriott-at-mcdowell-mountains/>
- Epix Hotel & Resorts  
Indoor Lodging Scottsdale, AZ 85260  
480-948-4755
- Holiday Inn  
14255 N 87th Street  
Scottsdale, AZ 85260  
480-922-6500  
<http://www.ihg.com/holidayinn/hotels/us/en/scottsdale/phxsa/hoteldetail>

## Online Registration

To register for the Tax Committee meetings and dinner, please visit our registration site Cvent at [www.ici.org/reg/tax](http://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 questions about registration, please contact Ezella Wynn at 202/218-3560 or [ewynn@ici.org](mailto:ewynn@ici.org).

## Committee Dinner

As in the past, arrangements are being made for the Tax Committee dinner on Thursday, March 3. 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 \$105.00. Full refunds of the \$105.00 will be made to anyone canceling a dinner reservation by 3:00 p.m. (Eastern) on Monday, February 29. Refunds will not be provided for dinner reservations cancelled thereafter.

## 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 Ryan Lovin (at 202/326-5826 or [ryan.lovin@ici.org](mailto:ryan.lovin@ici.org)).

Greg Hinkle  
Tax Committee Chair

**endnotes**

[1] See Institute [Memorandum](#) (29574) dated December 18, 2015

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