

MEMO# 30887

September 26, 2017

Joint Pension and Pension Operations Advisory Committee Meeting, Tuesday, October 17 -- Agenda Attached

[30887]

September 26, 2017 TO: Pension Committee

Pension Operations Advisory Committee RE: Joint Pension and Pension Operations Advisory Committee Meeting, Tuesday, October 17 -- Agenda Attached

The next joint meeting of the Pension and Pension Operations Advisory Committees will take place on Tuesday, October 17, 2017, 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 and Dinner Registration

To register for the October meeting, please visit our registration site at www.ici.org/reg/pension. Please note that the only way to register for the meeting and dinner (described below) 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.

Speakers

Michael Kreps and Brigen Winters, Principals at Groom Law Group, will provide an update on tax reform efforts, and, in particular, prospects for the retirement saving incentives to be impacted in connection with such efforts.

Jon Breyfogle, Principal, Groom Law Group, will discuss what to expect regarding changes to the fiduciary rule and related exemptions, including the anticipated timing and process under which changes will be proposed.

If you have any suggestions for additional agenda items, please email them to Elena Chism (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.

October 16 Dinner

We are organizing an informal dinner for the evening of Monday, October 16 at 6:00 p.m. for Committee members (or their substitutes) and ICI staff at a nearby restaurant; details will follow. The cost of the dinner is \$105.00 per person and can be paid via credit card as part of the registration process. Please note that dinner cancellations must be made by 5:00 p.m. Eastern on Thursday, October 12 in order to receive a refund.

Jason Bortz
Chairperson - Pension Committee

[Attachment](#)

Copyright © by the Investment Company Institute. All rights reserved. Information may be abridged and therefore incomplete. Communications from the Institute do not constitute, and should not be considered a substitute for, legal advice.