

MEMO# 23861

October 8, 2009

Conference Call to Discuss New RMD Guidance; October 14th, 3 PM ET

[23861]

October 8, 2009

TO: PENSION COMMITTEE No. 21-09
PENSION OPERATIONS ADVISORY COMMITTEE No. 22-09
TRANSFER AGENT ADVISORY COMMITTEE No. 76-09
BANK, TRUST AND RECORDKEEPER ADVISORY COMMITTEE No. 47-09 RE: CONFERENCE
CALL TO DISCUSS NEW RMD GUIDANCE; OCTOBER 14TH, 3 PM ET

On October 14, at 3 p.m. ET, we will hold a conference call to discuss operational and compliance issues related to the recently-issued Guidance on 2009 Required Minimum Distributions. [\[1\]](#) The guidance included two sample plan amendments, transitional relief for plan operation, rollover relief for plans and IRAs, and nine Qs and As. We will discuss issues raised by sample amendments, any transitional relief issues (e.g., remaining issues with substantially equal periodic payments; one-rollover per-year restriction for IRAs; rollovers into the same plan or other plans/IRAs), as well as communication issues related to this Guidance.

Please RSVP for the call or submit questions in advance of the call by emailing adriggs@ici.org.

Call Dial-in: 888-809-8968

Passcode: 54948

Date/Time: October 14, 3 p.m. E.T.

Anna Driggs
Assistant Counsel

endnotes

[1] See [Memorandum](#) to Pension Members No. 46-09, Transfer Agent Advisory Committee No. 70-09, Bank, Trust and Recordkeeper Advisory Committee No. 43-09 [23818], dated September 28, 2009.

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