

MEMO# 27288

June 10, 2013

Preliminary Agenda for June 20-21 Tax Committee Meetings in San Francisco, CA

[27288]

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TO: TAX COMMITTEE No. 16-13 RE: PRELIMINARY AGENDA FOR JUNE 20-21 TAX COMMITTEE MEETINGS IN SAN FRANCISCO, CA

As we informed you previously, the next meetings of the Tax Committee will be held on Thursday, June 20, and Friday, June 21. [\[1\]](#) If you plan to attend the meetings and have not registered already, please do so at your first convenience by using the attached link: www.ici.org/reg/tax. If you have any questions about registration, please contact Ezella Wynn at 202/218-3560 or ewynn@ici.org.

Lunch will be served at 1:00 p.m. on Thursday and at the conclusion of the meeting on Friday. All meetings will be held at the offices of BlackRock, 405 Howard Street (corrected address) San Francisco, CA.

Meeting Topics/Agenda

The meeting on Thursday, June 20 will begin at 2:00 p.m. and involve a detailed discussion on Derivatives. The June 21 meeting will begin at 9:30 a.m. and will focus on all tax issues of interest to the industry. Preliminary agendas for both meetings are attached.

Committee Dinner And Baseball Plan

The Tax Committee dinner will be held on Thursday, June 20. The location and time will be announced at the meeting. A group of Tax Committee members, alternatively, will be attending a San Francisco Giants baseball game that evening. A block of tickets will be purchased for the game; each Tax Committee member will be charged for the cost of his/her ticket.

Continuing Professional Education (CPE) Credit

Meeting attendees are eligible for approximately 7.0 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.

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.

* * *

If you have any questions or comments regarding the upcoming meetings, please contact Keith Lawson (at 202/326-5832 or lawson@ici.org) or Karen Gibian (at 202/371-5432 or kgibian@ici.org) or Ryan Lovin (at 202/326-5826 or ryan.lovin@ici.org).

Greg Hinkle
Tax Committee Chair

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

endnotes

[1] See Institute Memorandum ([27159](#)) to Tax Committee No. 8-13, dated April 5, 2013.

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