

MEMO# 26179

May 23, 2012

Preliminary Agenda for June Tax Committee Meetings - Milwaukee

[26179]

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TO: TAX COMMITTEE No. 28-12 RE: PRELIMINARY AGENDA FOR JUNE TAX COMMITTEE MEETINGS - MILWAUKEE

As we previously informed you, [\[1\]](#) the next meetings of the Tax Committee will be held on June 5 and 6, 2012, in Milwaukee, Wisconsin, at the Pfister Hotel, 424 E. Wisconsin Avenue. The meeting on Tuesday, June 5 will begin at 2:00 p.m. (Central); the meeting on Wednesday, June 6 will begin at 9:00 a.m. (Central). Lunch will be served prior to the meeting on Tuesday and at the conclusion of the meeting on Wednesday. Breakfast will be served before the meeting begins on Wednesday. Business casual attire is appropriate for the meetings.

If you plan to attend the June meetings, please register at www.ici.org/reg/tax. If you have any questions about online registration, please contact Ezella Wynn at (202) 218-3560 or ewynn@ici.org.

Meeting Topics and Agenda

The meeting on Tuesday, June 5, will focus on several international and domestic issues, including EU reclaims and FATCA. Representatives from Ernst & Young will lead Tuesday's discussion. The preliminary agenda for the Wednesday, June 6 meeting is attached, which focuses on all tax issues of interest to the industry.

Evening Events

As in previous years, we have made plans to attend a baseball game on Tuesday, June 5, at 7:10 p.m., between the Milwaukee Brewers and the Chicago Cubs. Alternatively, arrangements are being made for others to attend dinner at a local restaurant. When registering for the meetings on the ICI website, please indicate whether you plan to attend the baseball game or the dinner.

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.

For more information regarding administrative policies such as complaint and refund, please contact our offices 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 (202-326-5832 or lawson@ici.org) or Karen Gibian (202-371-5432 or kgibian@ici.org).

Greg Hinkle
Tax Committee Chair

[Attachment](#)

endnotes

[1] See Institute [Memorandum](#) (26006) to Tax Committee No. 16-12, dated March 30, 2012.

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