

**MEMO# 32210**

February 13, 2020

## **Agendas for February 24 and 25 Tax Committee Meeting**

[32210]

February 13, 2020 TO: ICI Global Tax Committee  
Management Company Tax Subcommittee

Tax Committee RE: Agendas for February 24 and 25 Tax Committee Meeting

The ICI Tax Committee will meet on Monday, February 24 (2:00 pm to 5:00 pm) and Tuesday, February 25 (9:30 am to 1:00 pm), 2020. We will serve lunch beginning at 12:30 pm on Monday and at the end of the Tuesday meeting; breakfast also will be served Tuesday morning beginning at 8:00 am.

The meetings will be held in the David Silver Conference Room on the 12th floor of ICI's offices at 1401 H Street, NW, Washington, DC 20005.

### **Meetings Topics/Agenda**

Agendas for the meetings are attached. Representatives from EY will lead the discussion on Monday, February 24, and will focus on federal tax issues requiring legislative changes, a history of important RIC issues, and other current issues. On February 25, we will discuss all legislative, federal regulatory, international, and state tax issues of interest to the industry.

### **Committee Dinner**

The Tax Committee dinner will be held on Monday, February 24, at MXDC Cocina Mexicana Restaurant (600 14th St NW). The cost of the dinner is \$115.00, which can be paid online during the meeting registration process (see below). Full refunds of the \$115.00 will be made to anyone canceling a dinner reservation by 3:00 pm ET on February 19. Refunds will not be provided for dinner reservations cancelled thereafter.

### **Online Registration**

Please register for the Tax Committee meeting and dinner online at: [www.ici.org/reg/tax](http://www.ici.org/reg/tax). Committee members attending the dinner will pay a standard amount via credit card as part of the registration process. If you have any questions about registration, please contact Ruth Tadesse at 202/326-5836 or [rtadesse@ici.org](mailto:rtadesse@ici.org).

### **Building Security**

Please note that meeting attendees will need to check in at the main lobby security desk.

## **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.

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If you have any questions or comments regarding the upcoming meetings, please contact Keith Lawson (202/326-5832 or [lawson@ici.org](mailto:lawson@ici.org)), Karen Gibian (202/371-5432 or [kgibian@ici.org](mailto:kgibian@ici.org)), or Katie Sunderland (202/326-5826 or [katie.sunderland@ici.org](mailto:katie.sunderland@ici.org)).

Jon Davis  
Tax Committee Chair

[Attachment](#)

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