

MEMO# 28647

January 9, 2015

February 24 and 25, 2015 Tax Committee Meetings in Austin, TX

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TO: TAX COMMITTEE No. 1-15 RE: FEBRUARY 24 AND 25, 2015 TAX COMMITTEE MEETINGS IN AUSTIN, TX

The next regularly-scheduled meetings of the Tax Committee will be held on February 24 and February 25, 2015, in Austin, Texas at the offices of Dimensional Fund Advisors, 6300 Bee Cave Road, Building One. The Tuesday, February 24 meeting will begin at 2:00 p.m. and will be preceded by lunch. The Wednesday, February 25 meeting will begin at 9:30 a.m. and will be preceded by breakfast. Lunch will be served at the conclusion of the meeting on Wednesday. A complete preliminary agenda for both the February 24 and February 25 meetings will be distributed approximately one week prior to the meetings.

Online Registration

You may register for the Tax committee meeting, as well as dinner (Tuesday, February 24) online through Cvent at www.ici.org/reg/tax. If you have any further questions about registration, please contact Ezella Wynn at 202/218-3560 or ewynn@ici.org.

Hotel Reservations

We have arranged for a room block for Monday, February 23 and Tuesday, February 24 at the W Austin Hotel, which is located at 200 Lavaca Street, Austin, Texas. Please make your reservations by calling 512-542-3600 or you may make your reservations online at: <https://www.starwoodmeeting.com/StarGroupsWeb/res?id=1501080825&key=37C054CA>.

To receive the preferred hotel rate of \$299 per night plus tax, reserve your hotel room before the cutoff date of February 2, 2015 and identify yourself as a member of Investment Company Institute.

Committee Dinner

As in the past, arrangements are being made for the Tax Committee dinner on Tuesday, February 24. We plan to start dinner at approximately 6:00 p.m. at a nearby restaurant. If

you plan to attend the dinner, you must register at our registration site; the cost of dinner will be \$85.00. Full refunds of the \$85.00 will be made to anyone canceling a dinner reservation by 3:00 p.m. (Eastern) on Thursday, February 19. Refunds will not be provided for dinner reservations cancelled thereafter.

Suggestions for Meeting Topics

Please forward any suggestions that you have for issues to be discussed at these meetings to Keith Lawson (202/326-5832 or lawson@ici.org), Karen Gibian (202/371-5432 or kgibian@ici.org) or Ryan Lovin (202/326-5826 ryan.lovin@ici.org).

Continuing Professional Education (CPE) Credit

Meeting attendees are eligible for approximately 7.5 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 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.

Greg Hinkle
Tax Committee Chair

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