

**MEMO# 32479**

May 22, 2020

## **ICI Joint Pension and Pension Operations Advisory Committees Conference Call-- Tuesday, June 2, 2020 at 3:00 PM EDT**

[32479]

May 22, 2020 TO: Pension Committee

Pension Operations Advisory Committee RE: ICI Joint Pension and Pension Operations  
Advisory Committees Conference Call--Tuesday, June 2, 2020 at 3:00 PM EDT

The next joint conference call of the ICI Pension and Pension Operations Advisory Committees is scheduled for **Tuesday, June 2, 2020 from 3:00 - 4:30 PM EDT**. The agenda is attached, with links to relevant background material.

Also, for background, attached are current charts describing the status of (1) state-level activity relating to standards of conduct for broker-dealers and investment advisors and (2) state-run retirement savings programs for private sector workers. These charts relate to Agenda Items 3.c and 7 respectively. As you know, we have been following efforts in various states to create state-run retirement plans for private sector workers without access to workplace-based plans, as well as recent state efforts to enact legislation relating to the standards of conduct that apply to broker-dealers and investment advisors. To help keep track of developments in these areas, the attached state-by-state charts describe legislative or other proposals (and in some cases, enacted legislation) and the current status of these initiatives. Please keep in mind that the status of legislation in any given state can change very quickly, and that the reporting and tracking of new proposals and changes to legislation can be inconsistent. We would appreciate you bringing to our attention any proposed legislation being contemplated in your respective states of residence.

If you have any suggestions for additional agenda items, please send your suggestions to Elena Chism ([elena.chism@ici.org](mailto:elena.chism@ici.org)).

If you would like to participate in the call, please send an email to Brenda Turner ([bturner@ici.org](mailto:bturner@ici.org)) by noon on Monday, June 1. To participate, **please dial 1-866-810-4668 and enter passcode 9072128**. An Outlook calendar appointment will follow.

We look forward to your participation in the call on June 2.

Thank you!

Jason Bortz  
Chairperson - Pension Committee

[Attachment No. 1](#)

[Attachment No. 2](#)

[Attachment No. 3](#)

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