

**MEMO# 28270**

July 16, 2014

## **Call to Discuss Changes to Year-End Tax Reporting Spreadsheets**

[28270]

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TO: TAX COMMITTEE No. 23-14 RE: CALL TO DISCUSS CHANGES TO YEAR-END TAX REPORTING SPREADSHEETS

A conference call will be held on Thursday, July 24, at 2:00 p.m. (Eastern) to discuss changes to the year-end tax reporting spreadsheets. Topics will include:

1. Possible changes to all layouts to allow reporting both per-share amounts and percentages.
2. Possible changes to the primary layout instructions to address the possibility of taxable LTCG.
3. Adding flexibility to the secondary spreadsheet to accommodate reporting with or without STCG.
4. Possible changes to the secondary layout to improve the STCG calculation.
5. Possible changes to the NRA layout (and any related changes to the other layouts) required to implement the new FATCA-compliant 1042 and 1042-S.

If you have any additional suggestions for the agenda, please contact me at 202-326-5826 or [ryan.lovin@ici.org](mailto:ryan.lovin@ici.org).

Ezella Wynn will send an Outlook calendar invitation for the call. If you would like to participate in the call, please simply accept the invitation. You also may contact Ms. Wynn directly by e-mail ([ewynn@ici.org](mailto:ewynn@ici.org)) if you do not receive the Outlook invitation. The dial-in number for the call is 888-455-9763 and the passcode is 60960.

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