

MEMO# 25934

February 23, 2012

Preliminary Agenda for February 28-29 Tax Committee Meetings

[25934]

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TO: TAX COMMITTEE No. 12-12 RE: PRELIMINARY AGENDA FOR FEBRUARY 28-29 TAX COMMITTEE MEETINGS

As we informed you previously, the next meetings of the Tax Committee will be held on Tuesday, February 28, and Wednesday, February 29. [\[1\]](#) If you plan to attend the meetings and have not registered already, please do so at your first convenience by using the attached link: www.ici.org/reg/tax. If you have any questions about registration, please contact Ezella Wynn at 202/218-3560 or ewynn@ici.org.

Lunch will be served at 1:00 p.m. on Tuesday and at the conclusion of the meeting on Wednesday. All meetings will be held in the David Silver Conference Room, on the 12th floor of the Institute's offices at 1401 H Street, NW, Washington, DC 20005.

Meeting Topics/Agenda

The meeting on Tuesday, February 28 will begin at 2:00 p.m. and involve a detailed discussion of RIC Modernization implementation issues. The February 29 meeting will begin at 9:30 a.m. and will focus on all tax issues of interest to the industry. Preliminary agendas for both meetings are attached.

Committee Dinner

The Tax Committee dinner will be held on Tuesday, February 28, at Ceiba (701 14th Street, NW, Washington, DC). We plan to start dinner at approximately 6:00 p.m. If you plan to attend the dinner, you must register at our registration site; the cost of the dinner will be \$85.00.

Continuing Professional Education (CPE) Credit

Meeting attendees are eligible for approximately 7.0 hours of CPE credit (Taxation). The Investment Company Institute is registered with the National Association of State Boards of

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& 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.
- DeliveryMode: 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 (at 202/326-5832 or lawson@ici.org) or Karen Gibian (at 202/371-5432 or kgibian@ici.org).

Greg Hinkle
Tax Committee Chair

[Attachment](#)

endnotes

[1] See Institute [Memorandum](#) (25789) to Tax Committee No. 7-12, dated January 12, 2012.

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