

**MEMO# 13959**

September 17, 2001

## **CONFERENCE CALL ON PORTABILITY ISSUES RELATING TO EGTRRA -- SEPTEMBER 26, 2001 AT 2:30 PM EST**

[13959] September 17, 2001 TO: PENSION COMMITTEE No. 62-01 PENSION OPERATIONS ADVISORY COMMITTEE No. 57-01 RE: CONFERENCE CALL ON PORTABILITY ISSUES RELATING TO EGTRRA -- SEPTEMBER 26, 2001 AT 2:30 PM EST A conference call has been scheduled for Wednesday, September 26, 2001 at 2:30 p.m. EST to discuss regulatory issues arising from the "portability" provisions of the Economic Growth and Tax Relief Reconciliation Act of 2001 ("EGTRRA") (e.g., sections 641-643 of EGTRRA). Members have expressed the need for regulatory clarification with regard to the implementation of such provisions; some examples of issues potentially requiring guidance relate to (1) the communication of information concerning rollover amounts to a "receiving" plan, (2) the treatment of after-tax rollover amounts, and (3) revisions to Form 8606 and other IRS forms. We hope to discuss these and other issues during the conference call. If you would like to participate in this call, please complete the attached response form and fax it to Brenda Turner by Monday, September 24th. In addition, if there are any particular issues you would like to discuss during the call, please provide the items on the response form or contact me at (202) 326-5837 or [tkim@ici.org](mailto:tkim@ici.org). Thomas T. Kim Assistant Counsel

Attachment