

MEMO# 19212

October 10, 2005

AGENDAS FOR OCTOBER 17 AND 18 TAX COMMITTEE MEETINGS IN WASHINGTON, DC

©2005 Investment Company Institute. All rights reserved. Information may be abridged and therefore incomplete. Communications from the Institute do not constitute, and should not be considered a substitute for, legal advice. [19212] October 10, 2005 TO: TAX COMMITTEE No. 33-05 RE: AGENDAS FOR OCTOBER 17 AND 18 TAX COMMITTEE MEETINGS IN WASHINGTON, DC Attached are the agendas for the Tax Committee meetings to be held on Monday, October 17, beginning at 2:00 p.m., and Tuesday, October 18, beginning at 9:30 a.m. at the offices of the Investment Company Institute, 1401 H Street, N.W., 12th Floor, Washington, DC 20005. During Monday's subcommittee meeting we will discuss federal tax reform. As background to this discussion, attached are a report written by the U.S. Government Accountability Office entitled "Understanding the Tax Reform Debate: Background, Criteria & Questions"¹ and a paper published by the Investment Company Institute entitled "Reducing the Tax Burden on Saving."² If you plan to attend any of these meetings and have not yet completed a meeting response form, please complete the attached copy of the form and submit it to the Institute's Ezella Wynn by fax (202-326-5841) or e-mail (ewynn@ici.org). * * * Continuing Professional Education (CPE) Credit Meeting attendees are eligible for approximately 7.00 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. 1 September 2005. 2 Rudolph G. Penner, KPMG Peat Marwick, Barents Group LLC, December 1994. 2 For more information regarding administrative policies such as complaint and refund, please contact our offices at 202/326-5968. • Learning Objectives: To provide updates on current legislative and regulatory developments affecting mutual funds and investment advisers. • Program Level: Update • Delivery Mode: 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 Lisa Robinson (at 202/326-5835 or lrobinson@ici.org). Donald Burke Tax Committee Chair Attachments A. Response Form B. Committee Agenda, 10/18 C. Subcommittee Agenda, 10/17 D. GAO Paper - Understanding the Tax Reform Debate E. ICI Paper - Reducing the Tax Burden on Saving

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