

**MEMO# 13790**

July 31, 2001

## **CONFERENCE CALL ON 402(F) NOTICE ITEMS - AUGUST 8, 2001 AT 2:30 PM EST**

[13790] July 31, 2001 TO: PENSION COMMITTEE No. 50-01 PENSION OPERATIONS ADVISORY COMMITTEE No. 46-01 TRANSFER AGENT ADVISORY COMMITTEE No. 55-01 RE: CONFERENCE CALL ON 402(f) NOTICE ITEMS - AUGUST 8, 2001 AT 2:30 PM EST A conference call has been scheduled for Wednesday, August 8, 2001 at 2:30 p.m. EST to discuss modifications to the IRS' model 402(f) notice in light of the Economic Growth and Tax Relief Reconciliation Act of 2001 ("EGTRRA"). As you may be aware, the Institute held a joint meeting of the Pension Committee and the Pension Operations Advisory Committee on July 19th to discuss various issues arising from the implementation of EGTRRA, including the need for guidance on a new 402(f) notice. We understand that the Treasury Department and the IRS are expediting their development of 402(f) guidance; thus, we hope to provide them comments on which items should be addressed in the notice. Attached for your review is a list of items identified at our July 19th meeting that possibly may need to be addressed in a revised model 402(f) notice. During the conference call, we hope to further develop this list and identify other matters that also should be addressed. If you would like to participate in this call, please complete the attached response form and fax it to Brenda Turner by Tuesday, August 7th. If you have any questions, comments or particular issues you would like to raise during the call, please call Russ Galer at (202) 326-5835, Kathryn Ricard at (202) 218-3563 or myself at (202) 326-5837. Thomas T. Kim Assistant Counsel Attachments Attachment no. 1 (in .pdf format)