

MEMO# 10307

September 22, 1998

INSTITUTE MEETING ON ROTH IRA GUIDANCE -- OCTOBER 22, 1998

1 See Institute Memorandum to Pension Committee No. 57-98 and Pension Operations Advisory Committee No. 42-98, dated August 31, 1998; Memorandum to Pension Committee No. 59-98, dated September 3, 1998; and Memorandum to Pension Operations Advisory Committee No. 43-98, dated September 4, 1998. 2 See Institute Memorandum to Pension Committee No. 60-98 and Pension Operations Advisory Committee No. 44-98, dated September 11, 1998. [10307] VIA FAX September 22, 1998 TO: PENSION COMMITTEE No. 63-98 PENSION OPERATIONS ADVISORY COMMITTEE No. 45-98 ROTH IRA AD HOC COMMITTEE RE: INSTITUTE MEETING ON ROTH IRA GUIDANCE -- OCTOBER 22, 1998

Recently, the Treasury Department and the Internal Revenue Service released guidance on Roth IRA issues in proposed regulations and in Notice 98-49.¹ The Institute has scheduled a conference call on the proposed regulations and the Notice on September 28.² In addition to the conference call, the Institute has scheduled a meeting on the Roth IRA guidance on Thursday October 22, 1998. The meeting will begin at 1:30 p.m. in the David Silver Conference Room at the Institute's offices, 1401 H Street, N.W., 12th Floor, Washington, D.C. This meeting will follow the Pension Committee meeting scheduled for the morning of October 22. A lunch will be served following the Pension Committee meeting. We are soliciting agenda items for the meeting. Please call me at (202) 218-3563 or Russ Galer at (202) 326-5835 with any suggested agenda items. To assist us in obtaining an accurate registration of attendees, please indicate on the response form below if you or an alternate plan to attend the meeting and/or the lunch. Kathryn A. Ricard Assistant Counsel

ATTENDANCE RESPONSE FORM FOR ROTH IRA GUIDANCE MEETING Thursday, October 22, 1998 - 1:30 p.m. EDT Please fax this form by Monday, October 19, 1998 to Theresa Brice at 202-326-5841. Lunch Roth IRA Guidance Meeting COMMITTEE MEMBER - COMPANY

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