

MEMO# 9157

August 12, 1997

SEPTEMBER 22 TAXPAYER RELIEF ACT CONFERENCE ON TAX AND IRA PROVISIONS - PRELIMINARY PROGRAM

[9157] August 12, 1997 TO: ACCOUNTING/TREASURERS COMMITTEE No. 25-97 OPERATIONS MEMBERS No. 16-97 PENSION MEMBERS No. 34-97 PENSION OPERATIONS ADVISORY COMMITTEE No. 29-97 PRIMARY CONTACTS - MEMBER COMPLEX No. 53-97 TAX MEMBERS No. 32-97 TRANSFER AGENT ADVISORY COMMITTEE No. 40-97 RE: SEPTEMBER 22 TAXPAYER RELIEF ACT CONFERENCE ON TAX AND IRA PROVISIONS - PRELIMINARY PROGRAM

The Investment Company Institute is pleased to invite you to a special one-day conference designed to provide a detailed overview of tax and IRA legislation included in the Taxpayer Relief Act of 1997, enacted on August 5. The conference will focus on significant tax changes for mutual funds and on IRA expansion, including the new Education IRA and "Roth" back-end IRA. The conference is designed both to explain the new law and provide registrants an opportunity to ask questions about new provisions. Invited panelists include industry representatives, officials from the Department of Treasury and Congressional staff. A final announcement detailing the panelists will be mailed as soon as finalized. This one-day event will be at the Renaissance Washington D.C. Hotel, 999 9th Street NW in Washington, on Monday, September 22. Registration is limited to 350, so please make your reservations as soon as possible. To register complete the attached registration form and return it, along with a check made payable to the Investment Company Institute for \$225.00 for members and \$325.00 for non-member registrants. Cancellations received after September 10 will incur a \$75.00 administration fee. Please make your own hotel reservations by calling the Renaissance Washington D.C. Hotel at 202/898-9000. To receive the special room rate of \$155.00 for a single/double room you must mention the Investment Company Institute when making your reservation. The hotel reservation cut-off date for the conference rate is August 28, 1997. The hotel will continue to offer this rate through September 5, 1997 subject to availability. Russell G. Galer Assistant Counsel

Attachments (in .pdf format)